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GOODS AND SERVICES
USER GUIDE FOR CASHÉ FMS EVV

Fiscal Management Services (FMS)
CDCS/CSG

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ABOUT CASHÉ FMS EVV

As a Minnesota-based company developed specifically for caregiving agencies and support providers, Cashé Software offers the EVV app – a robust, software solution for complying with federal regulations and mandates, including the Americans with Disabilities Act (ADA), the Health Insurance Portability and Accountability Act (HIPAA), and Electronic Visit Verification (EVV).

Included in the 21st Century Cures Act, EVV is a federal requirement being implemented by the state of Minnesota in the coming months. EVV uses GPS to record the employee's location only at the moment of clock in and clock out times. For more information, visit the Minnesota Department of Human Services and Medicaid.gov's EVV webpages: http://bit.ly/3oQZBjy and http://bit.ly/39zkp95.

Each employee will receive their own username and password to enter their OWN time entries. The time entries will be electronically sent to the support manager. The support manager will receive their own username and password to approve the time entries. Once approved, the time entries are sent to our Payroll Department.

Highlights of the new system:

- Mobile, tablet, and computer app that can be used for time entry and approvals
- Ability to provide budget expense summaries for participants
- Multi-lingual translation to increase accessibility
- Ongoing, custom software updates to further improve the user experience.

If you need assistance or have a question, please submit an email ticket to our technical team at CasheSupport@lifeworks.org or by calling 651-454-2732 and asking for Cashé Support.

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When submitting an email ticket, please provide the following information:

- Screenshot of error message (if applicable)
- Description of why you are reaching out
- Your Full Name
- Your Username
- Name of Your Employee (if applicable)
- Name of Participant
- Preferred contact method for the response
    - If a phone call is preferred, please specify best Date & Time for a returned call.

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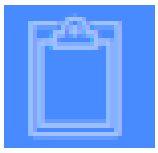
GETTING STARTED

SNAPSHOT OF NAVIGATION

Dashboard (Default View) *1st Icon on the bottom of the screen*	
Care History *2nd Icon on the bottom of the screen*	
My Profile *3rd Icon on the bottom of the screen*	
Notifications *4th Icon on the bottom of the screen*	
Refresh *Upper Right Corner of the screen*	
Menu *Upper Left Corner of the screen*	

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GLOSSARY

Cashé Term(s)	Lifeworks Term(s)	Definition
Client Recipient of Care	Participant	Individual who receives services
Responsible Party	Support Manager	Individual responsible for managing the participant's services

MINIMUM SYSTEM REQUIREMENTS

For Cashé FMS EVV to work properly on your device, please be sure you have the minimum system requirements as listed below.

- Phone/Tablet
  - iPhone (iOS) – Version - IOS 10 or above
  - Android – Version – Android 6.0 Marshmallow or above
- Website URL – Computer
  - Google Chrome Version - 88.0.4324 or above

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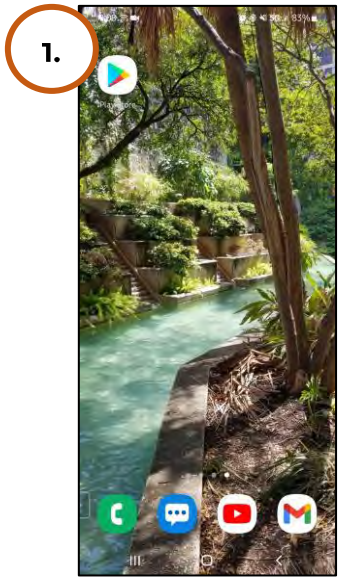
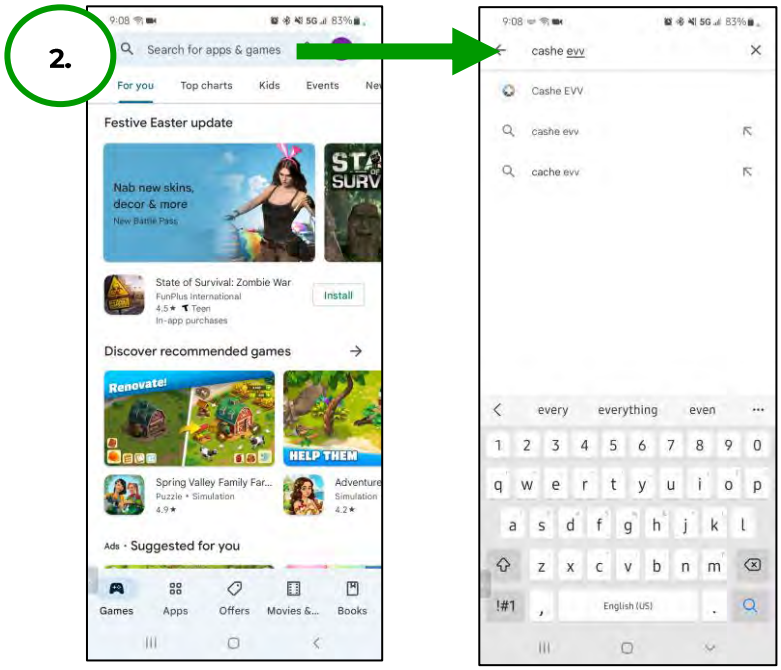
HOW TO ACCESS CASHÉ FMS EVV

ANDROID APP – PHONE AND TABLET

1. On your phone or tablet, select the **Play** icon on your device to open the store. Please note: the Cashé EVV app is free to download.



2. In the **search**, type the word **cashe evv** and select the app: **Cashé EVV** .



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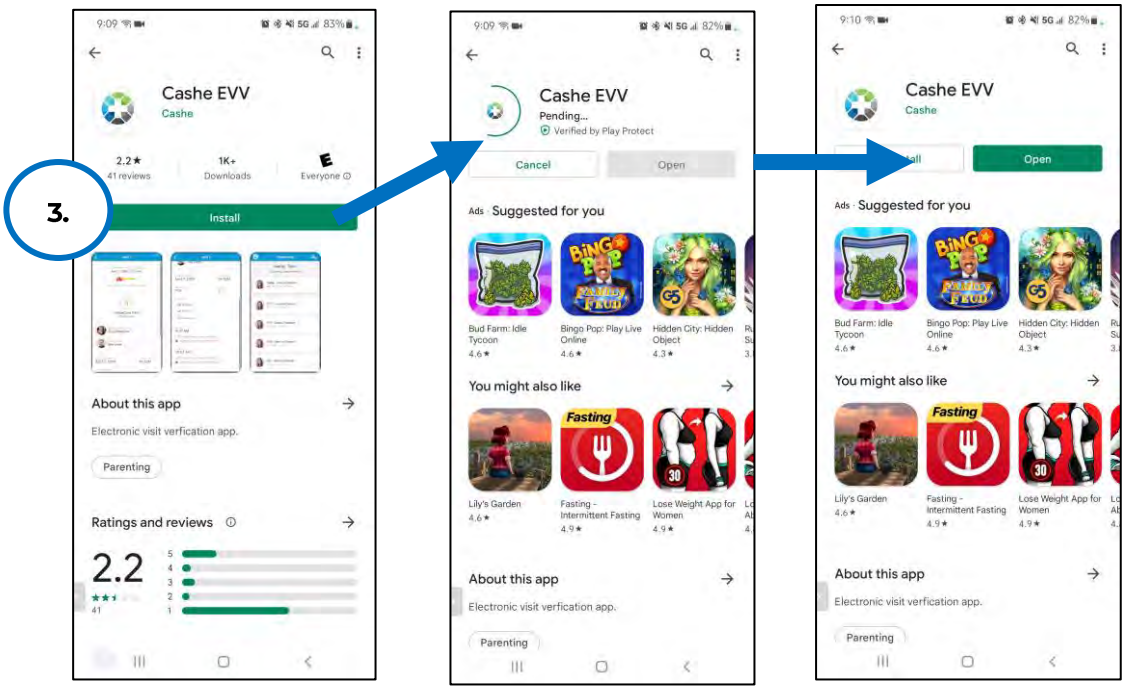
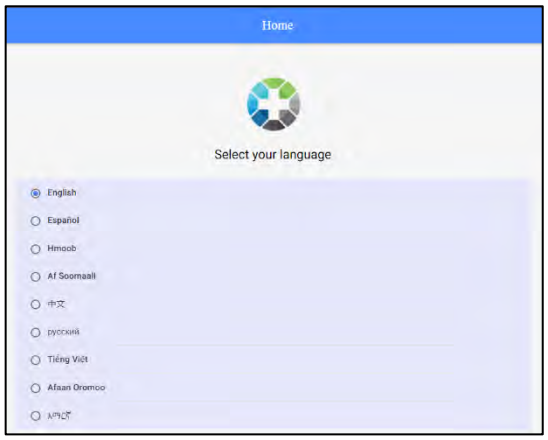
3. Select **Install** to add the app to your device. The app will now appear on the home screen of your device.



4. When opening the app for the first time, you will be prompted to **Select your language**.



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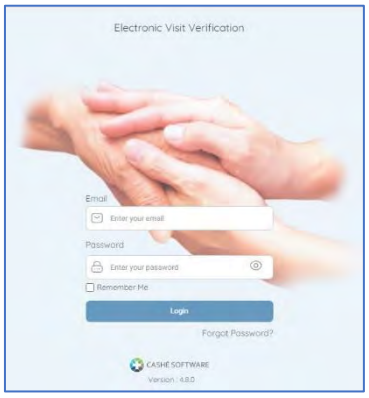
5. As soon as your preferred language is selected, you will need to select **OK** and will be directed to the Cashé FMS EVV login page.



IOS/APPLE APP – IPAD AND IPHONE

1. On your iPad or iPhone, select the **App Store** icon on your device to open the store. Please note: the Cashé FMS EVV app is free to download.

2. In the search tab, type the word **cashe evv** and select the app: **Cashé EVV** .

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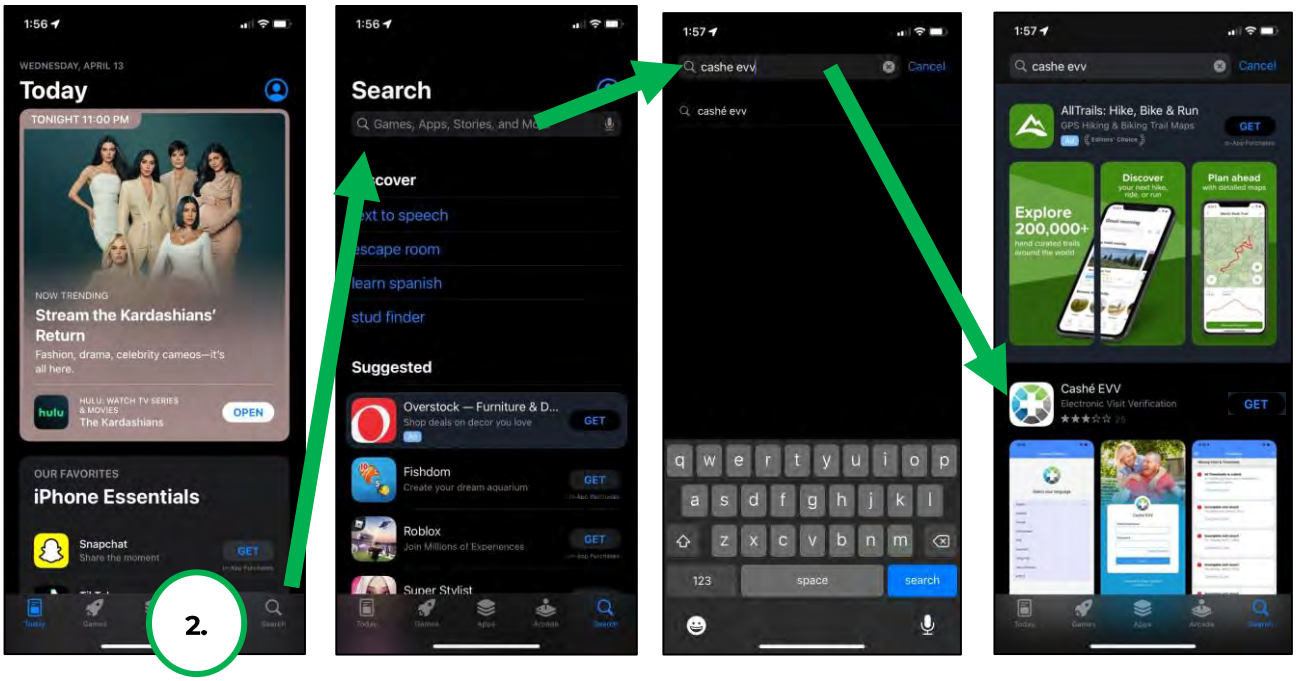
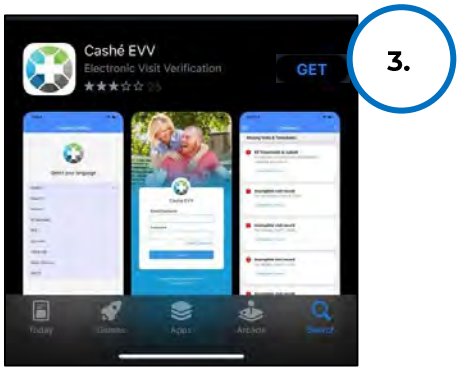
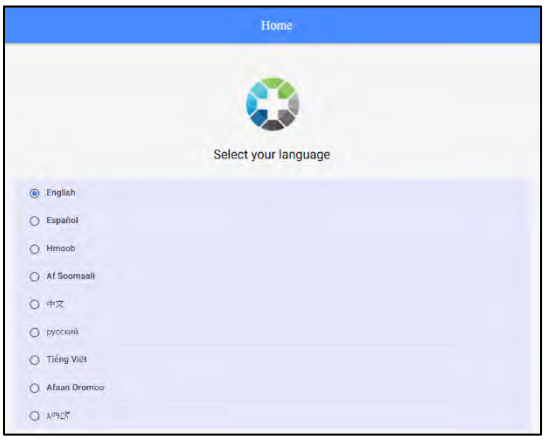


3. Tap the **GET** button to add the app to your device. The app will now appear on the home screen of your device.



4. When opening the app for the first time, you will be prompted to **Select your language**.



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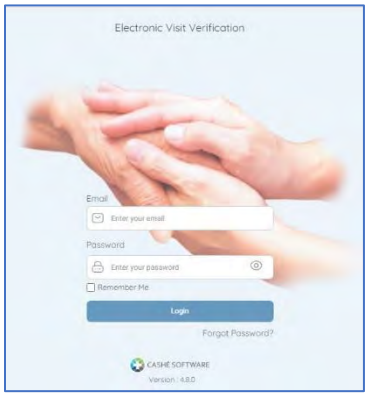
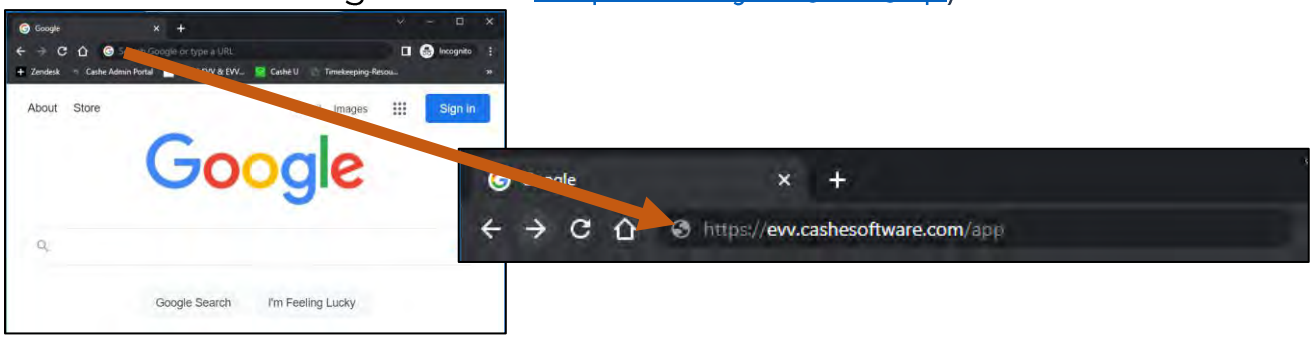
5. As soon as your preferred language is selected, you will need to select **OK** and will be directed to the Cashé FMS EVV login page.



WEBSITE URL – COMPUTER

1. To access Cashé FMS EVV on your computer, type the following website https://evv.cashesoftware.com/app

   The vendor and Lifeworks recommend using Chrome as your browser for accessing the new system. (To download Chrome, select the following website https://bit.ly/2QCJQ0p)



2. Once you press enter, Cashé FMS EVV may prompt you to select your preferred language. You must select your preferred language even if it seems to have already been chosen.

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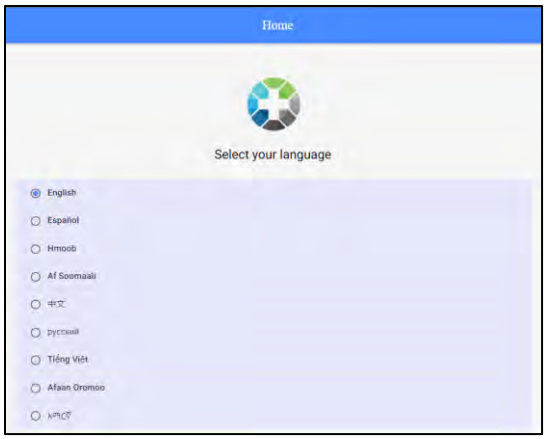
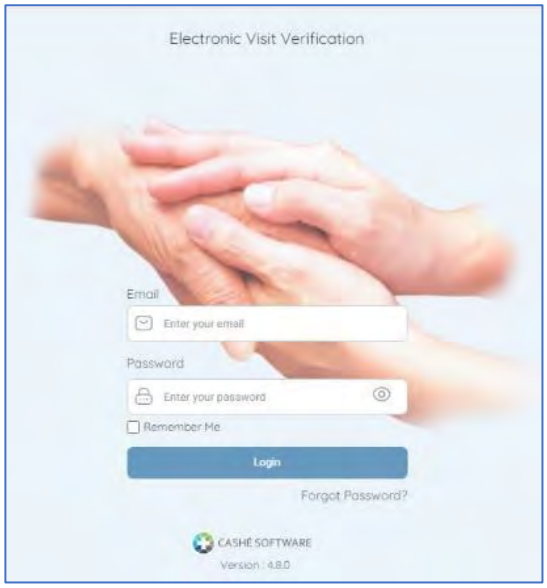


3. As soon as your preferred language is selected, you will need to select **OK** and will be directed to the Cashé FMS EVV login page.



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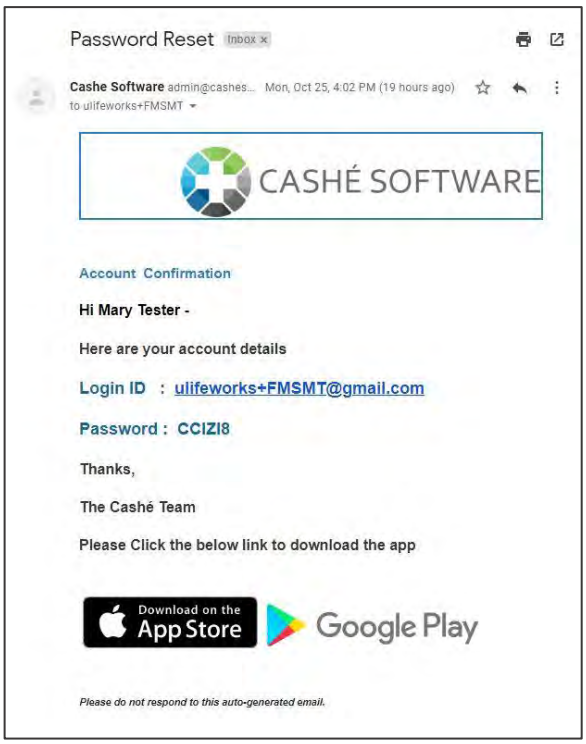
HOW TO LOG IN AND SET UP YOUR PASSWORD

1. Before accessing the new Timekeeping and Spending-Summary System, you will receive an email from admin@cashesoftware.com with your login information.
    a. Login ID - This is your unique email that Lifeworks has on file
    b. Password - This is a temporary password; you will be required to change after logging into Cashé FMS EVV



2. Open Cashé FMS EVV on your preferred device. Not sure how to access the app? For instructions on how to download the app onto your phone, tablet, or computer reference the How to Access Cashé EVV section in this User Guide.

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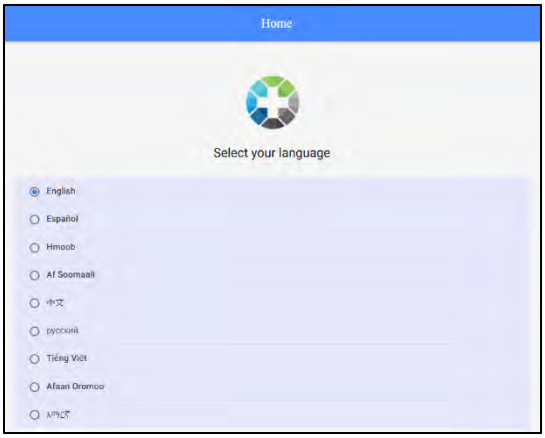
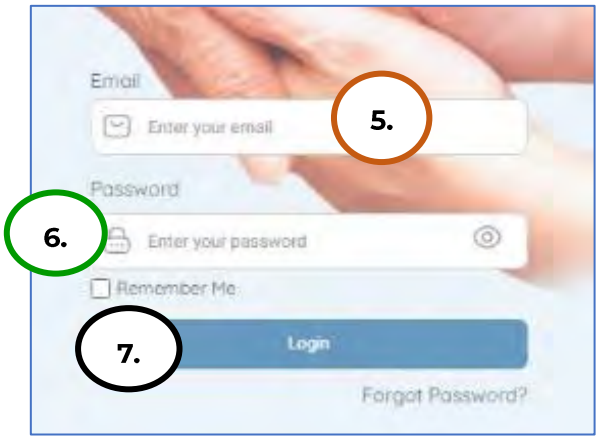
3. Prior to logging in to Cashé FMS EVV, select your preferred language. Note: English is the default choice. If English is your preferred choice, you must select **English** to continue.
4. On the **Language setting has been applied successfully** message, select **OK**.



5. In the **Email/Username** field enter your Login ID.
   a. Reminder: This is your unique email that Lifeworks has on file
6. In the **Password** field enter your temporary password
   a. Reminder: Because this is a temporary password; you will be required to change it after logging into Cashé FMS EVV
7. After you've entered your email and password, select the **Login** button.



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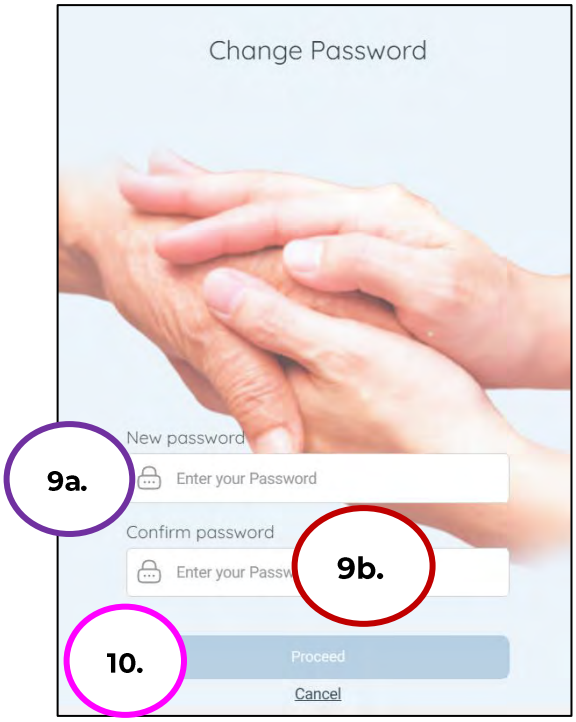
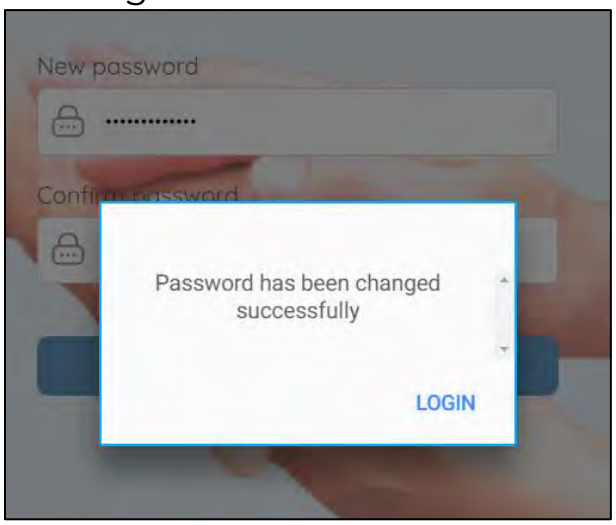
8. You will be prompted to change your password. For your password to be accepted, it will need to include:
    - Lowercase letters (includes spaces)
    - Uppercase letters
    - Special characters (!$%^&*()_+|~-=\` {}[]:";'<>?,./)
    - A number (0-9)
    - Be at least 8 characters in length
9. Enter a New Password of your choosing in the following:
    a. **New Password**
    b. **Confirm Password**
10. Select **Proceed**



11. Select **Login** on the **Password has been changed successfully** message



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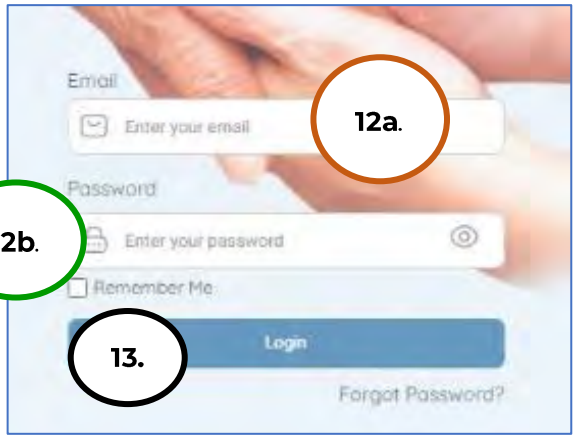
12. Enter the following:
    a. **Email/Username** = Login ID
    b. **Password** = The password you just created
13. Select **Login**



NOTE: After logging in, you will be redirected to the Dashboard screen of Cashé FMS EVV.

HOW TO RESET YOUR PASSWORD

1. On Login screen, select **Forgot Password**

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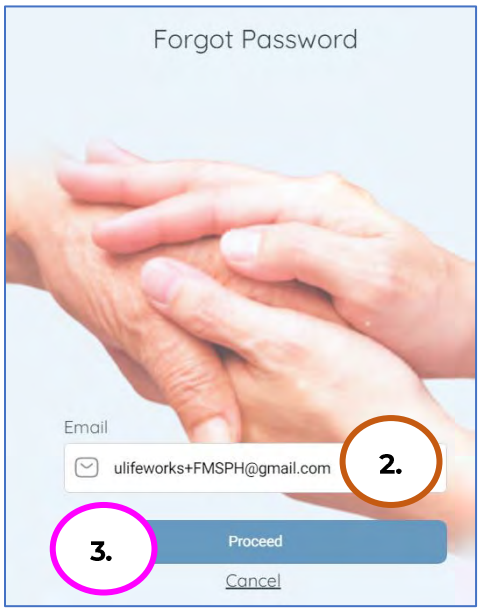
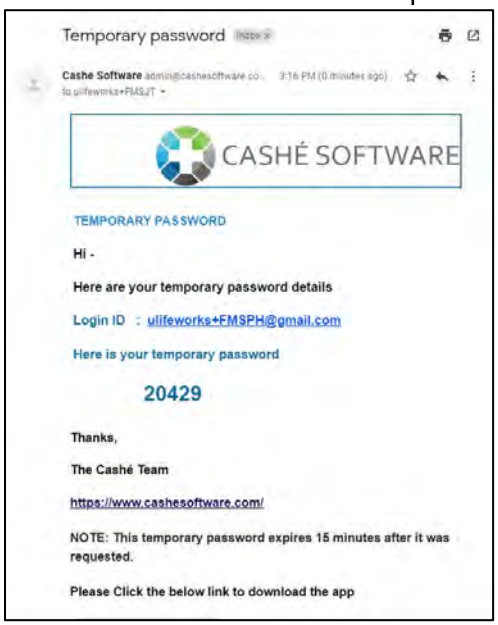
2. Email should auto populate from previous screen
    a. If not Enter your email in the **Email** box
3. Select **Proceed**



4. Check your email for **Temporary password** notification
5. Make note of the temporary password



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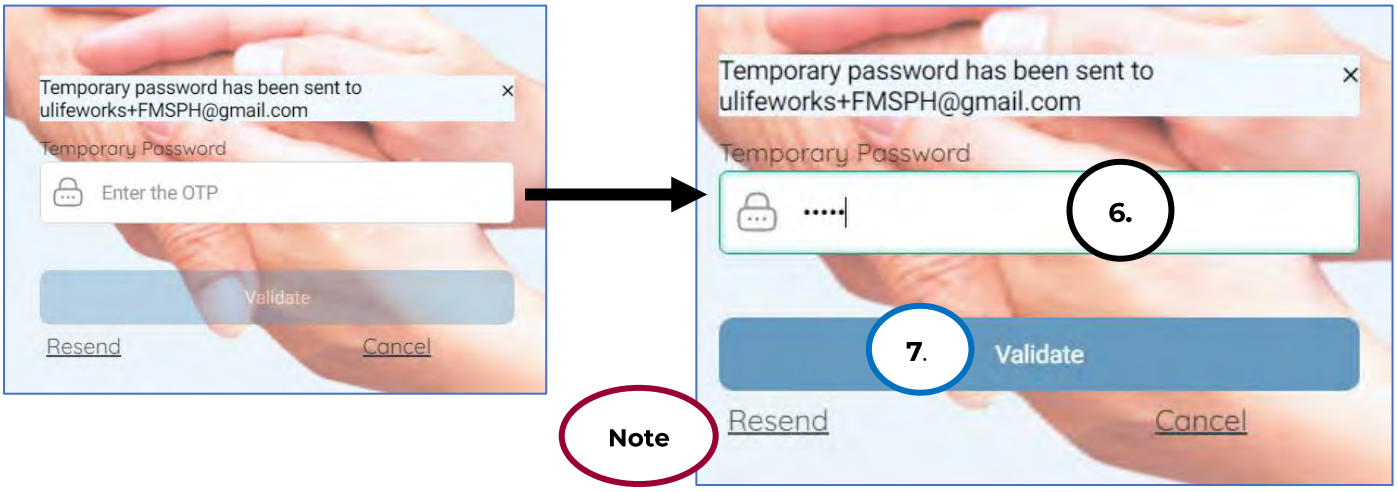
6. Enter the temporary password in the **OTP** field
7. Select **Validate**

NOTE: if you did not get the email, select **Resend**

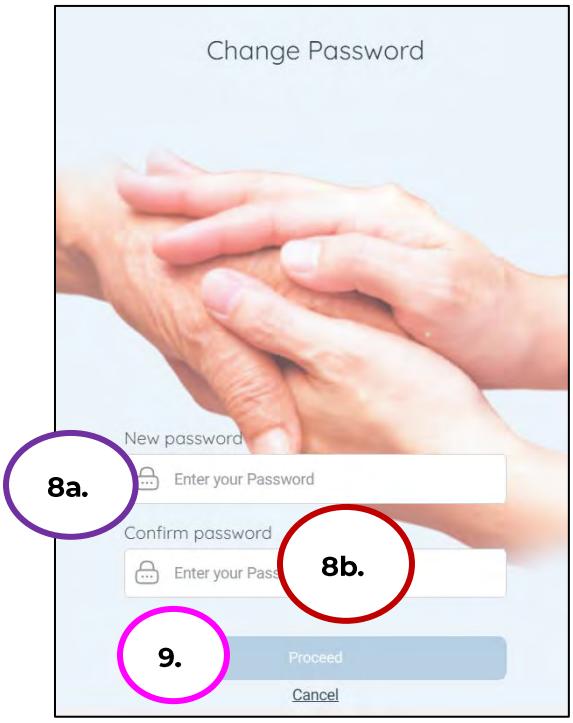


8. Enter a **New Password** of your choosing in the following
   a. **New Password**
   b. **Confirm Password**

NOTE: Be sure to follow the password guidelines below:

- Lowercase letters (includes spaces)
- Uppercase letters
- Special characters (!$%^&*()_+|~-=\` {}[]:";'<>?,./)
- A number (0-9)
- Be at least 8 characters in length

9. Select **Proceed**



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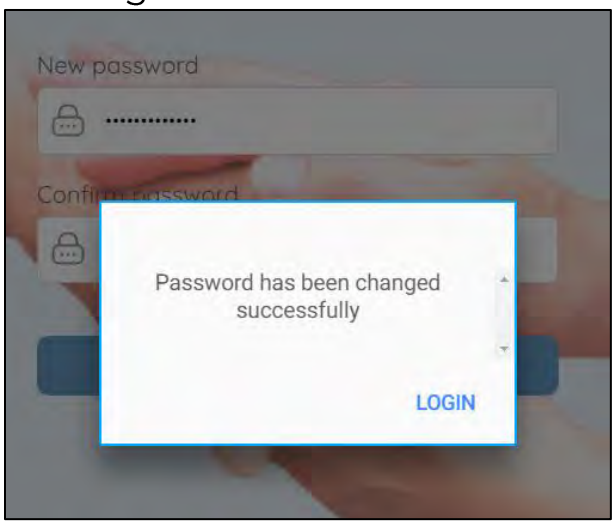
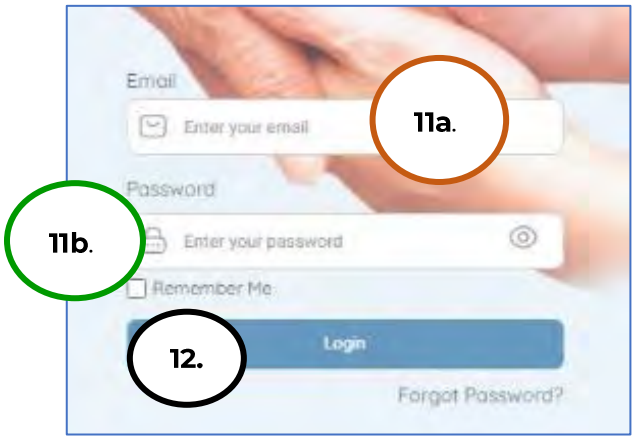
10. Select **Login** on the **Password has been changed successfully** message



11. Enter the following:
    a. **Email/Username** = Login ID
    b. **Password** = The password you just created
12. Select **Login**



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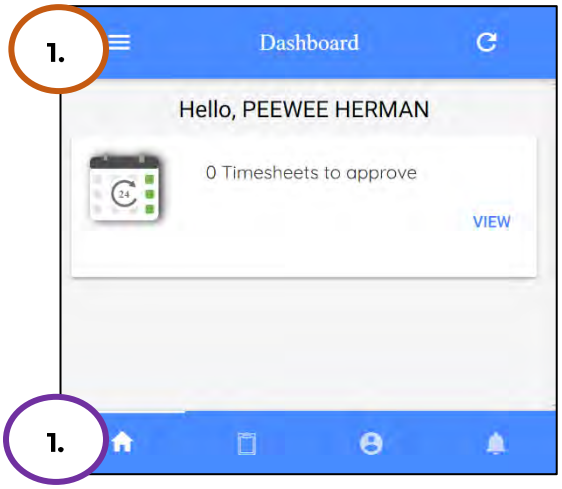
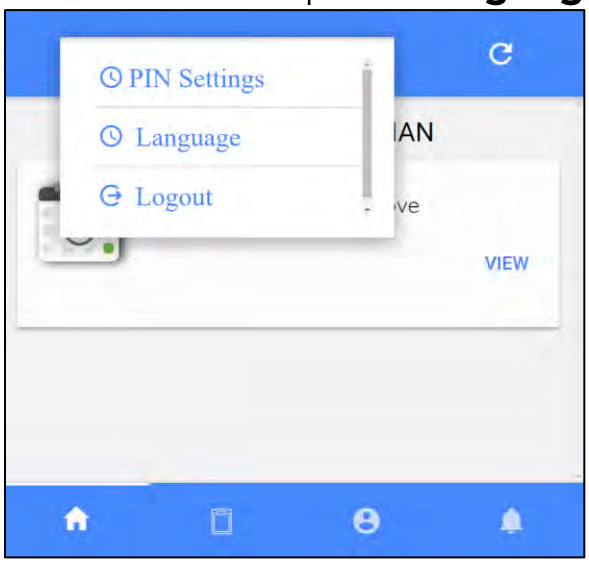
HOW TO USE CASHÉ FMS EVV

HOW TO CHANGE YOUR PREFERRED LANGUAGE

1. Select the **Menu** Icon in the upper left corner of the **Dashboard** Screen



2. Select the first option **Language**



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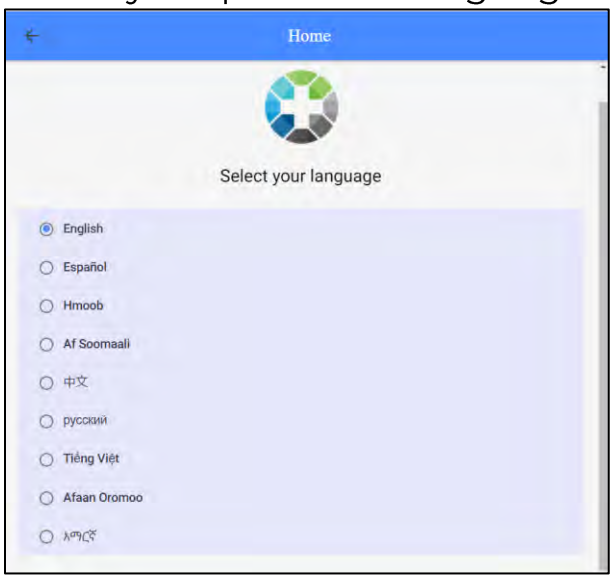
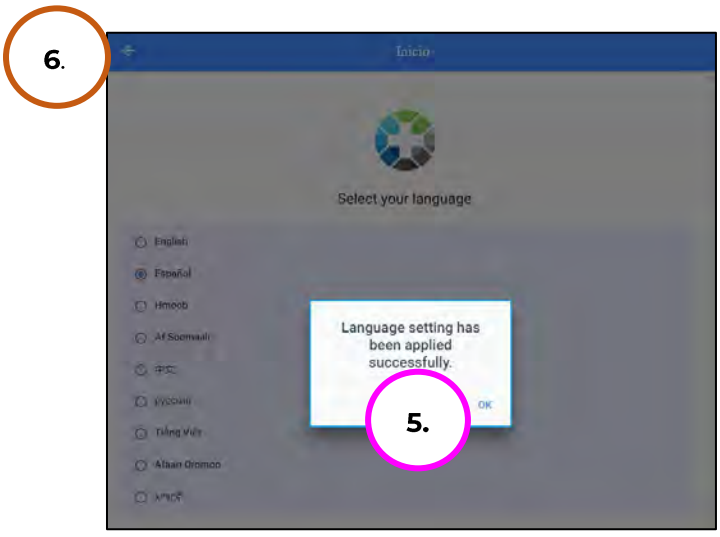
3. Select your preferred language



4. A confirmation message, **Language setting has been applied successfully** will appear
5. Select **OK**
6. Select the **back arrow** in the upper left corner of the screen to return to the Dashboard Screen



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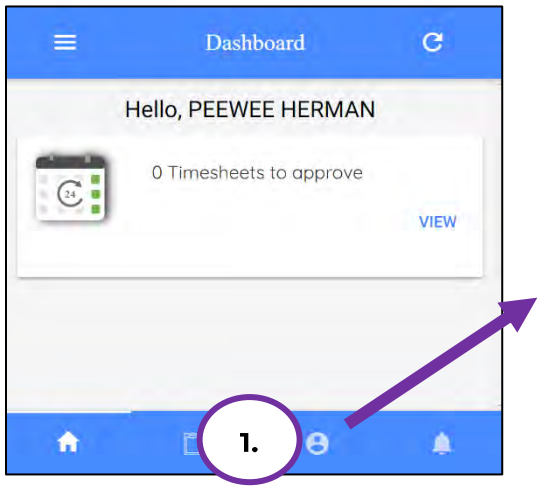
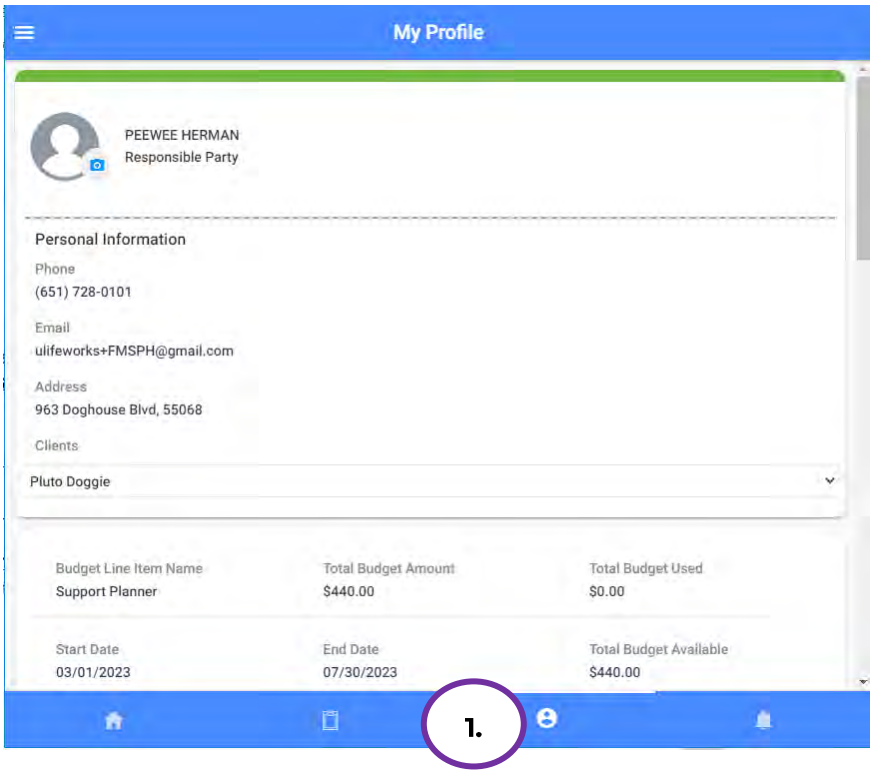
HOW TO ACCESS YOUR SERVICE UTILIZATION

1. Select **My Profile**, the 3rd image located at the bottom





2. Located after the Personal Information section are the Service Utilization details.

   NOTE: This area displays the dollars that have been currently used. This view shows the participant, budget line-item name, budget date range, the Service Agreement number, Total Budget Amount, Total Budget Used, and Total Budget Available in dollars. It also includes a Budget Transaction Details section for each Budget Line Item.

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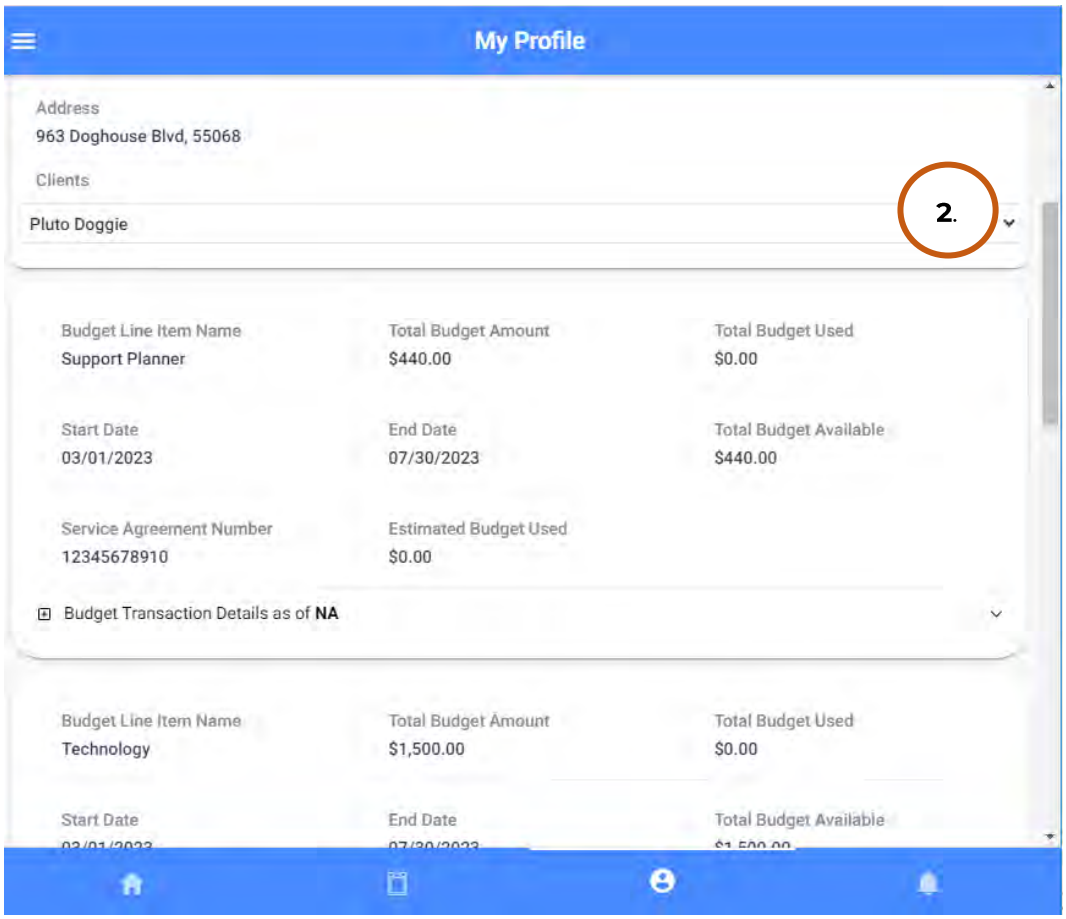
Also, if you are associated with multiple participants, select the drop-down menu under **Clients** to select a different participant.



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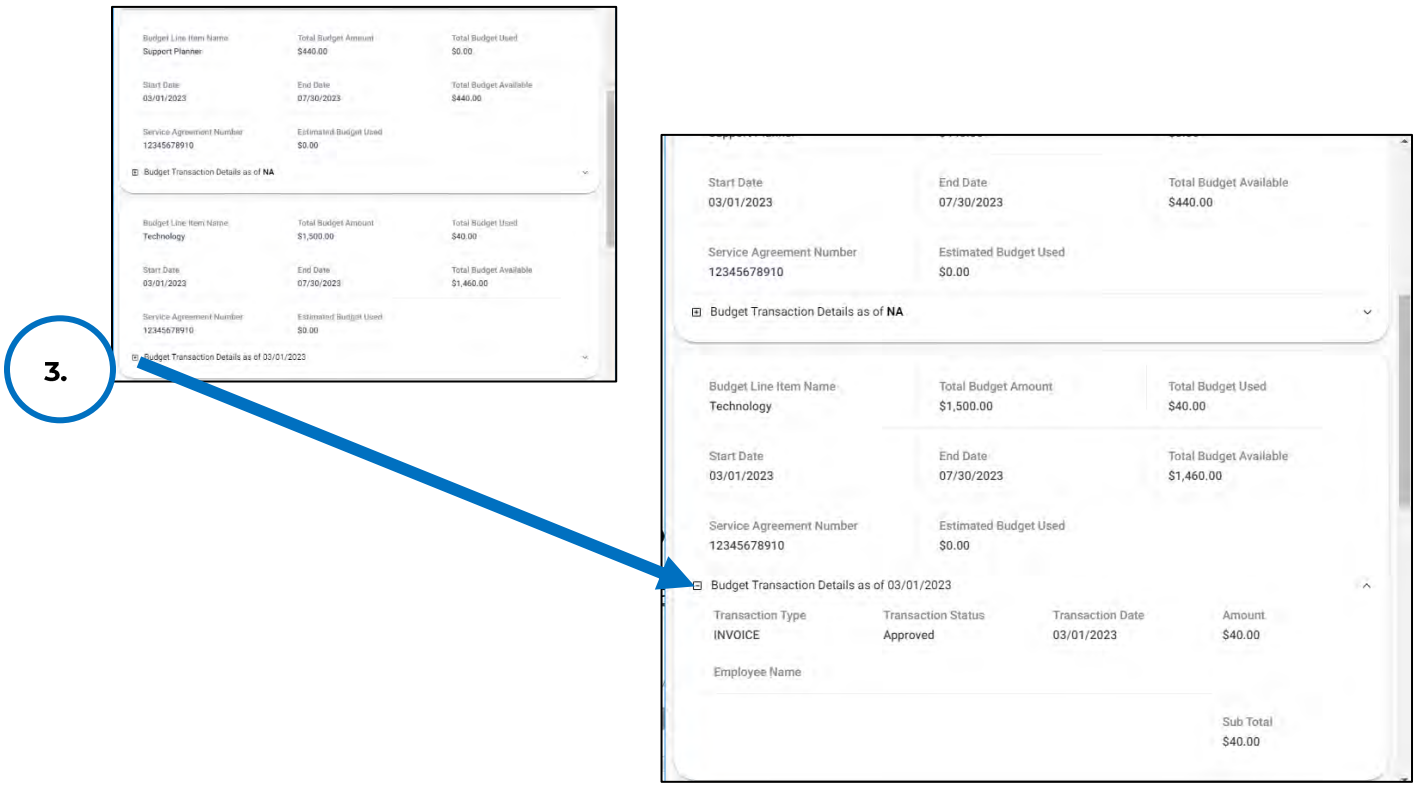
3. Select the **plus sign (+)** below the Service Agreement Number for each Budget Line item to expand the Budget Transaction Details.

   NOTE: This view will update once Lifeworks has processed the invoice.



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COMMONLY ASKED QUESTIONS

MISSING LOGIN INFORMATION

1. An email was sent from admin@cashesoftware.com; be sure to search your junk/spam, Promotions tab (Gmail accounts) AND Inbox folders for the information. You can refer to How to Log In and Set Up Your Password for an example of the email.
2. If you cannot find the original email, please send an email ticket to our technical team at CasheSupport@lifeworks.org to request new login information to be sent.
   Include the following information:
   - Your Full Name
   - Your Username
   - Preferred contact method for the response
     - If a phone call is preferred, please specify best the Date & Time for a returned call.

CANNOT LOG IN

1. Confirm that your username and password have been entered correctly.
2. If you still cannot to log in, restart the device by turning it completely off and then turning the device back on. Attempt to log in again.
3. If restarting the device does not work, if you are on your phone or tablet uninstall and reinstall the Cashé FMS EVV app. If you are using your computer, use the Google Chrome browser to type the website https://evv.cashesoftware.com/app/.

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4. If you still cannot log in, please submit an email ticket to our technical team at CasheSupport@lifeworks.org.
   Include the following information:

   - Screenshot of the error message
   - Your Full Name
   - Your Username
   - Preferred contact method for the response
     - If a phone call is preferred, please specify best the Date & Time for a returned call.

LANGUAGE PREFERENCE NOT UPDATING

1. The **Change Language** function should immediately update all fields with your preferred language. If that is not the case, log out of Cashé FMS EVV by selecting the menu icon in the upper left corner of the screen and Log Out. Then, log back into Cashé FMS EVV. The language should be updated with the preferred language.
2. If your preferred language still has not updated, please submit an email ticket to our technical team at CasheSupport@lifeworks.org.
   Include the following information:

   - Screenshot of where the language is not updated
   - Your Full Name
   - Your Username
   - Preferred contact method for the response
     - If a phone call is preferred, please specify the best Date & Time for a returned call.

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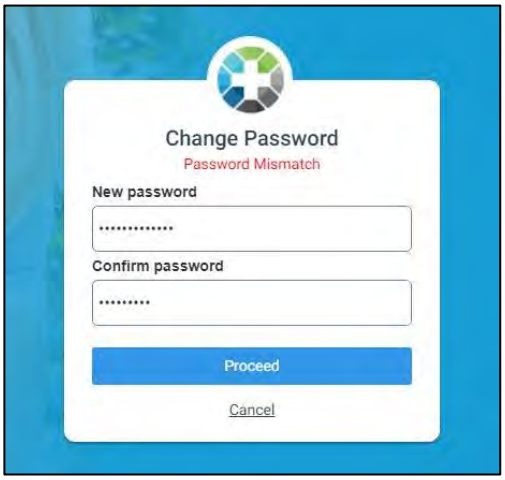
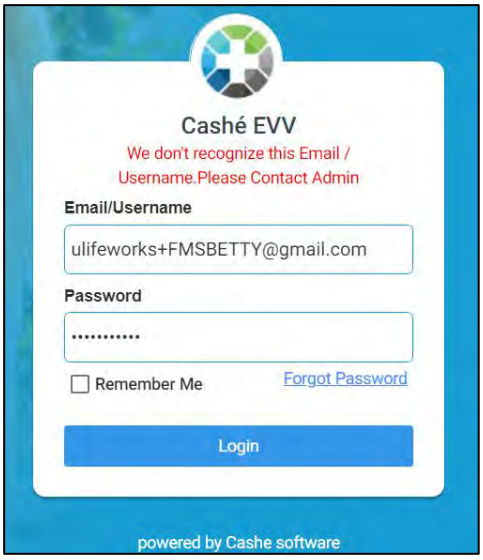
ERROR MESSAGES GUIDE

Below are images of possible error messages while using CASHÉ FMS EVV along with instructions for how to troubleshoot them.



Password Mismatch

Reason: The password you entered in **New password** does NOT match what was entered in **Confirm Password**.
Solution: Please carefully re-type the information. If you continue to receive the error message, submit an email ticket to our technical team at CasheSupport@lifeworks.org.



We don't recognize this Email/Username. Please Contact Admin

Reason: Your email username is incorrect, or you have not completed your registration with Cashé FMS EVV.
Solution:
1. Check your email for a welcome email from Cashé FMS EVV (admin@cashesoftware.com) and follow the steps for setting up your information.
2. Send an email ticket to our technical team at CasheSupport@lifeworks.org

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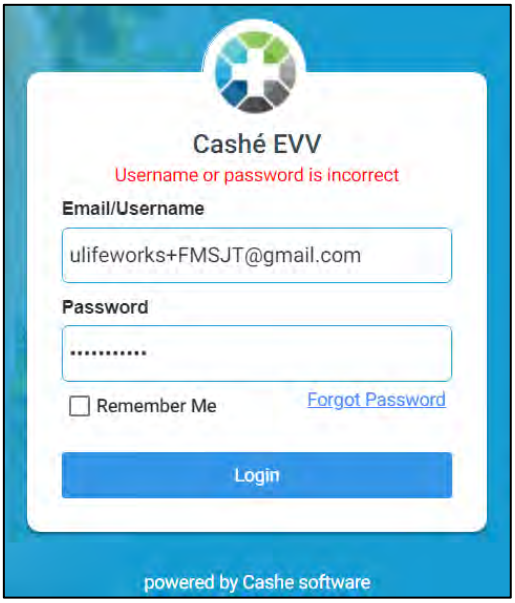
Username or password is incorrect

Reason: Your password or username is incorrect due to a typo or a different password was used to set up your login.
Solution: Please carefully re-type the information. If you continue to receive the error message, select "Forgot Password" to reset your information.



Multiple Users Found.

Reason: The email address provided to Lifeworks is being used by another individual or agency.
Solution: Please submit an email ticket to our technical team at CasheSupport@lifeworks.org if you need assistance. Include the following information:

- Description of why you are reaching out
- Screenshot of error message
- Your Full Name
- Your Username
- Preferred contact method for the response
    - If a phone call is preferred, please specify the best Date & Time for a returned call.

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Other error messages

If you receive any other error message and are unsure how to continue, please submit an email ticket to our technical team at CasheSupport@lifeworks.org. Include the following information:

- Description of why you are reaching out
- Screenshot of error message
- Your Full Name
- Your Username
- Name of Your Employee (if applicable)
- Name of Participant
- Preferred contact method for the response
    - If a phone call is preferred, please specify the best Date & Time for a returned call.

UPDATING CONTACT INFORMATION

Please submit an email ticket to our technical team at CasheSupport@lifeworks.org if you need to update your contact information (email, phone number, etc.). Include the following information:

- Your current information and the new information you need updated
- Your Full Name
- Your Username
- Name of Your Employee (if applicable)
- Name of Your Participant
- Preferred contact method for the response
    - If a phone call is preferred, please specify the best Date & Time for a returned call.

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WHO CAN I CONTACT TO ANSWER CASHÉ EVV RELATED QUESTIONS?

Please contact our technical team by sending an email ticket to CasheSupport@lifeworks.org or calling 651-454-2732 and asking for Cashé Support. Please have the following information available:

- Screenshot of error message (if applicable)
- Description of why you are reaching out
- Your Full Name
- Your Username
- Name of Your Employee (if applicable)
- Name of Participant
- Preferred contact method for the response
    - If a phone call is preferred, please specify the best Date & Time for a returned call.

Note: For the most recent version go to the following website https://www.lifeworks.org/timekeeping/.

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