EMPLOYEE USER GUIDE
FOR PAVILLIO EVV

PCA, Homemaker, Individualized Home Supports, Respite, and Night Supervision

ABOUT PAVILLIO EVV

As a Minnesota-based company developed specifically for caregiving agencies and support providers, Cashé Software offers Pavillio 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 that begins December 1, 2021. EVV uses GPS to record the employee's location during 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.

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 contact our technical team by sending an email 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 Authorized Representative/Support Manager (if applicable)
- Name of Participant
- Preferred contact method for the response

GETTING STARTED

SNAPSHOT OF NAVIGATION

	Dashboard (Default View)	Dashboard
What's Here?	Total Hours for current week Timecards started but NOT submitted to the Responsible Party	
	My Clients	My Clients
What's Here?	Names of Participant(s) you are currently working with Ability to ClockIn or ClockOut of shift Navigation to Timecard History Navigation to Manual Time Entry	
	My Profile	My Profile
What's Here?	Your contact information Lifeworks has on file Access to hours worked in the current week AND previous weeks	
	Notifications	Notifications
What's Here?	Notification of an action that occurred.	
	Menu	Menu
What's Here?	Navigation to change the default language Navigation to Logout	

GLOSSARY OF TERMS

Pavillio Term(s)	Lifeworks Term(s)	Definition
Client Recipient of Care Care Recipient(s)	Participant	Individual who receives services
Caregiver	Employee	Individual who works with the participant
Responsible Party	Support Manager Authorized Representative	Individual responsible for managing the participant's services
Visit	Shift	Time spent working one to one with or for the participant

MINIMUM SYSTEM REQUIREMENTS

For Pavillio 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

HOW TO ACCESS PAVILLIO EVV
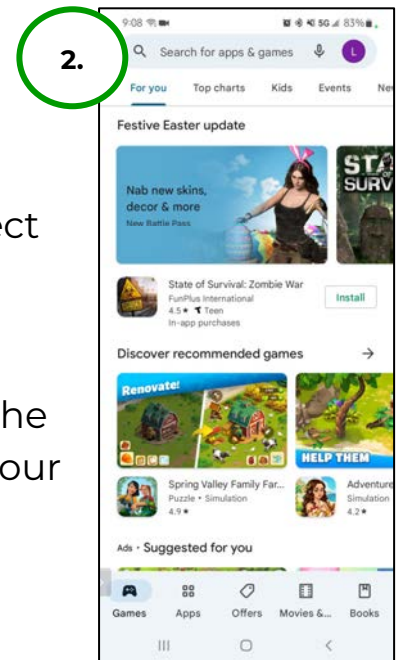
ANDRIOD APP – PHONE AND TABLET

1. On your phone or tablet, select the **Play** icon on your device to open the store.

   NOTE: the Pavillio EVV app is free to download.

2. In the **search**, type the word **pavillio** and select the app:
   Pavillio EVV .

3. Select **Install** to add the app to your device. The app will now appear on the home screen of your device.
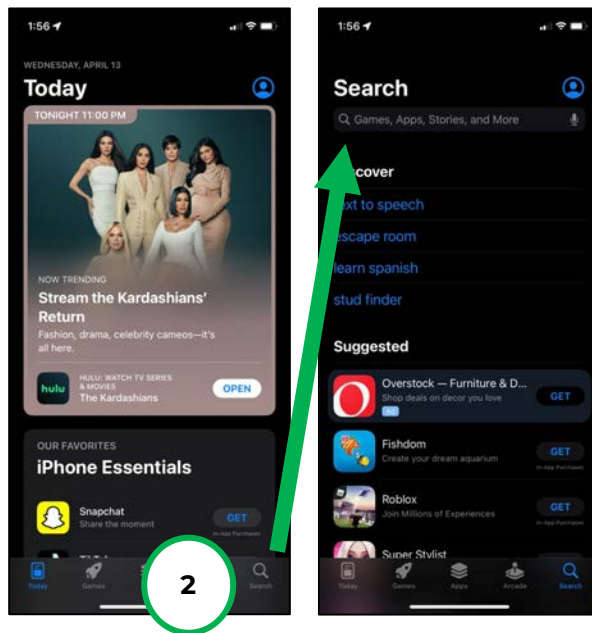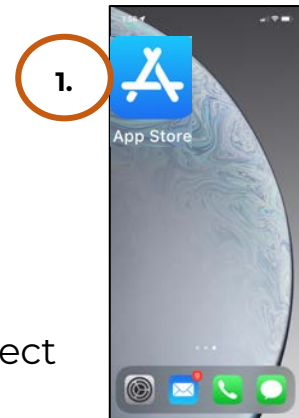
IOS/APPLE APP – IPAD AND IPHONE

1. On your iPad or iPhone, select the **App Store** icon on your device to open the store.

   NOTE: the Pavillio EVV app is free to download.

2. In the search tab, type the word **pavillio** and select the app: **Pavillio EVV** .

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

WEBSITE URL – COMPUTER

We recommend using Google Chrome as your browser for accessing Pavillio EVV. (To download Chrome, select the following website https://bit.ly/2QCJQ0p)

1. To access Pavillio EVV on your computer, type the following website https://app.pavillio.com/evv5/
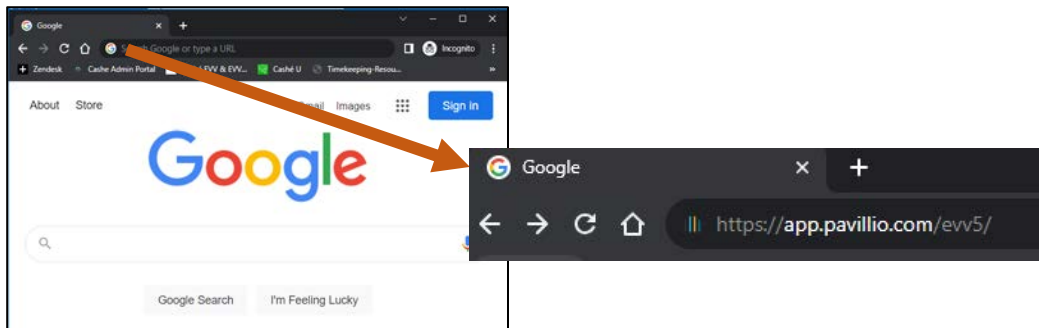
2. **Optional**
   a. Bookmark the Pavillio EVV website
      i. On your computer, open Google Chrome.
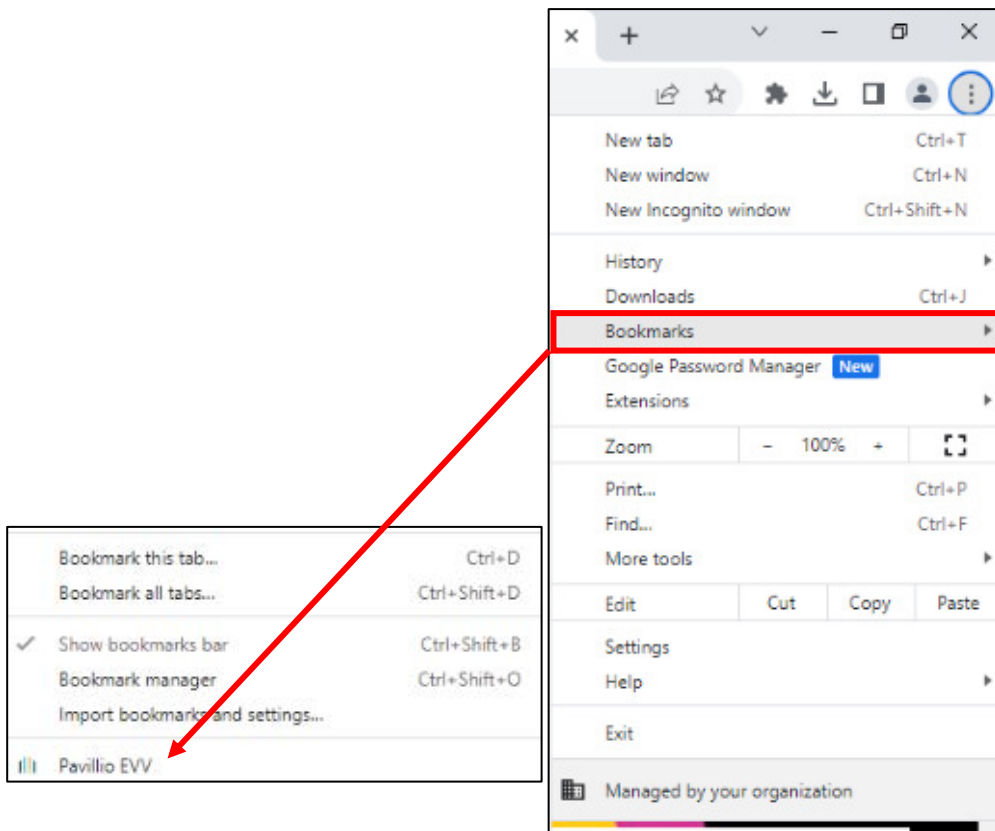   ii. Enter the website's URL that you want to bookmark: https://app.pavillio.com/evv5/
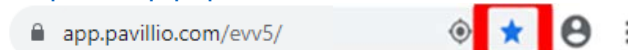
      iii. To the right of the address bar, select the Star ☆

b. Find a Bookmark in Google Chrome:
  i. On your computer, open Google Chrome.
  ii. At the top right, select More ⋮, then Bookmarks ❯.

  🔒 app.pavillio.com/evv5/

  iii. Find and select the bookmark

HOW TO LOG IN AND SET UP YOUR PASSWORD

1. You will receive 2 communications from Pavillio:
   - A text message to your mobile device with a **temporary password**.
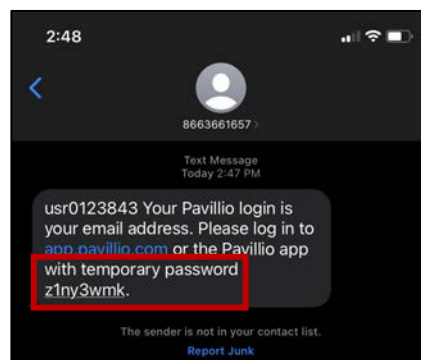
   - An email from **admin@pavillio.com** with the same **temporary password**. ***NOTE:*** Temporary Password will be valid for 30 days

2. Make note of the **temporary password**.

3. In the email, select **Please open the Pavillio EVV app (click [HERE]) to log in.** *OR* Access the Pavillio EVV app on your preferred device

4. Log in to Pavillio EVV

   a. Enter your email address into the in the **Email** box
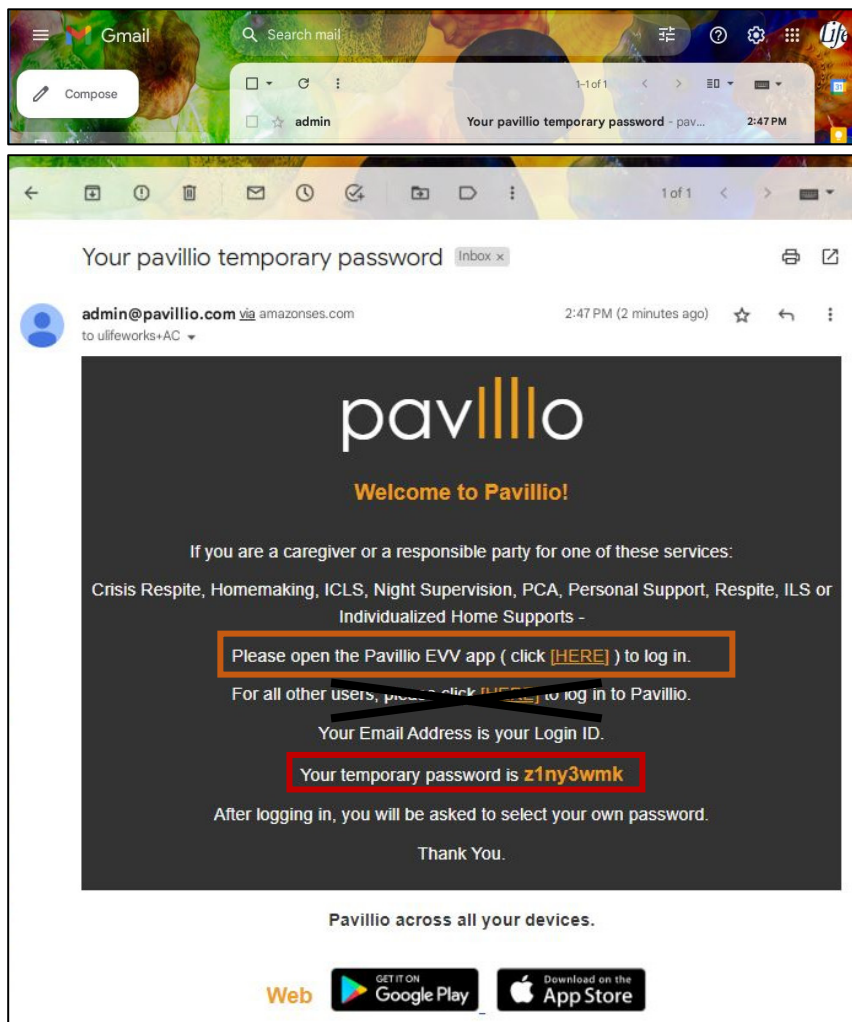   b. Enter your temporary password into the **Password** box.

5. After you've entered your email and password, select the **Login** button.

6. You will be prompted to change your password. For your password to be accepted, it will need to include:
   - Lowercase letters (includes spaces)
   - At least an Uppercase letter
   - At least a Special character (!$%^&*()_+|~=\`{}[]:";'<>?,?)
   - At least a number (0-9)
   - At least 8 characters in length

7. Enter the temporary password you were given via email and text message into the **Current Password** box.

8. Enter your chosen password into the **New Password** box and in the **Confirm Password** box

9. Select **Reset**

10. You will be redirected to the main login screen

11. Log in to Pavillio EVV

    a. Enter your email address into the in the **Email** box
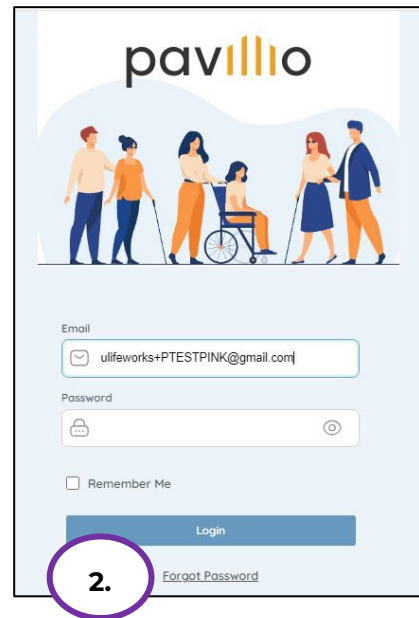   b. Enter your temporary password into the **Password** box.

12. Select **Login**

HOW TO RESET YOUR PASSWORD

1. Open Pavillio EVV on your preferred device. For assistance, refer to **How to Access Pavillio EVV**.

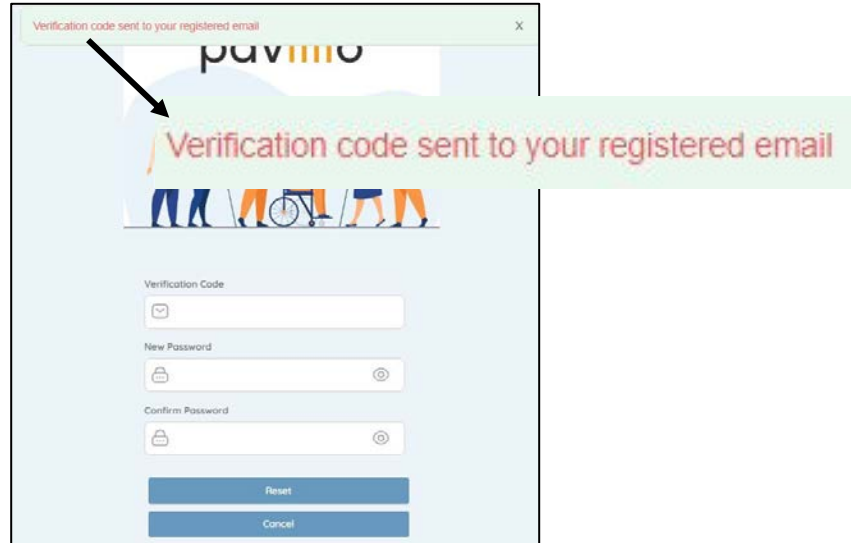2. On the Log In screen, select **Forgot Password**

3. Enter your Email Address (if not already there) into the **Email** box

4. Select **Send Verification Code**

5. You will receive a message **Verification code sent to your registered email**

6. Log in to your email and open the message from Pavillio titled **Your pavillio verification code**.

7. Make note of the verification code listed in the email.

8. ==**Do not click on the orange Log In button in the message**==. Instead, to log in, access the Pavillio EVV app on your phone/tablet or go to the EVV website: https://app.pavillio.com/evv5/. For assistance, refer to **How to Access Pavillio EVV**.
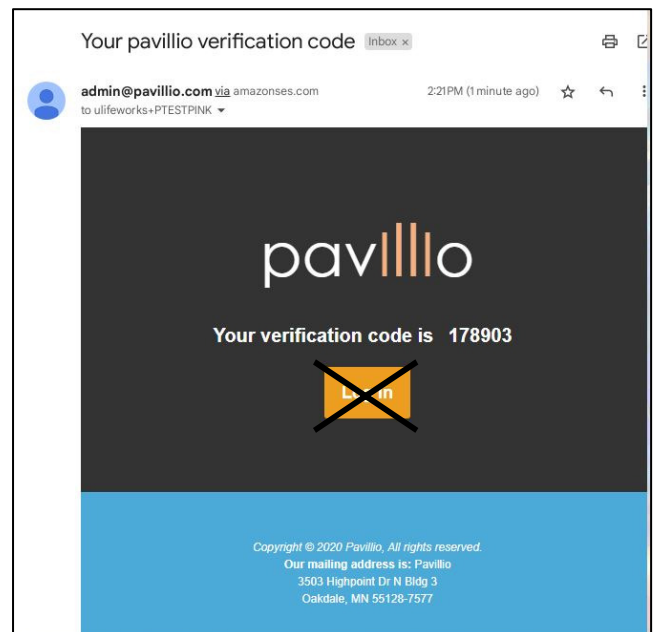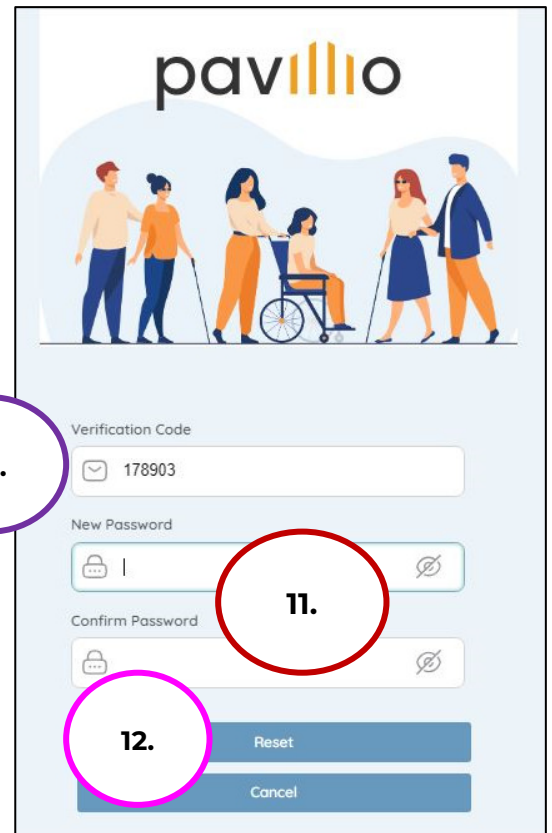
9. You will be prompted to change your password. For your password to be accepted, it will need to include:
   - Lowercase letters (includes spaces)
   - At least an Uppercase letter
   - At least a Special character (!$%^&*()_+|~=\` {}[]:";'<>?,?)
   - At least a number (0-9)
   - At least 8 characters in length

10. Enter the temporary password you were given via email and text message into the **Current Password** box.

11. Enter your chosen password into the **New Password** box and in the **Confirm Password** box

12. Select **Reset**

13. You will receive a message confirming that your password has been changed successfully.
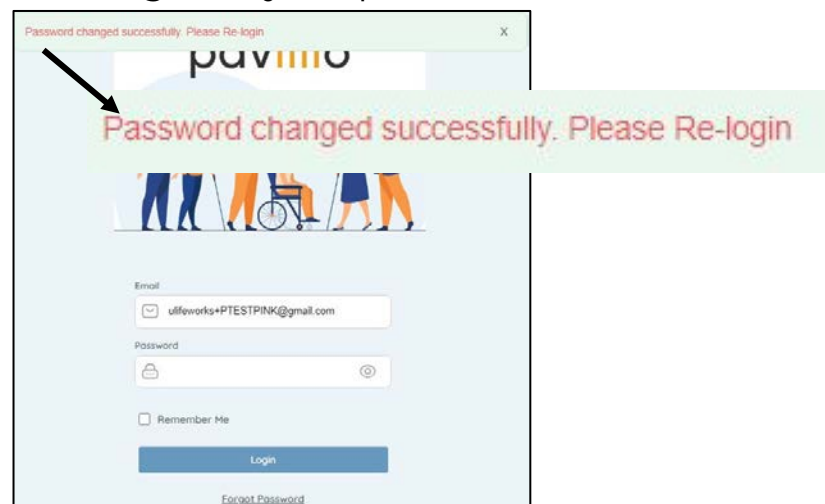
13. Log in to Pavillio EVV

    a. Enter your email address into the in the **Email** box
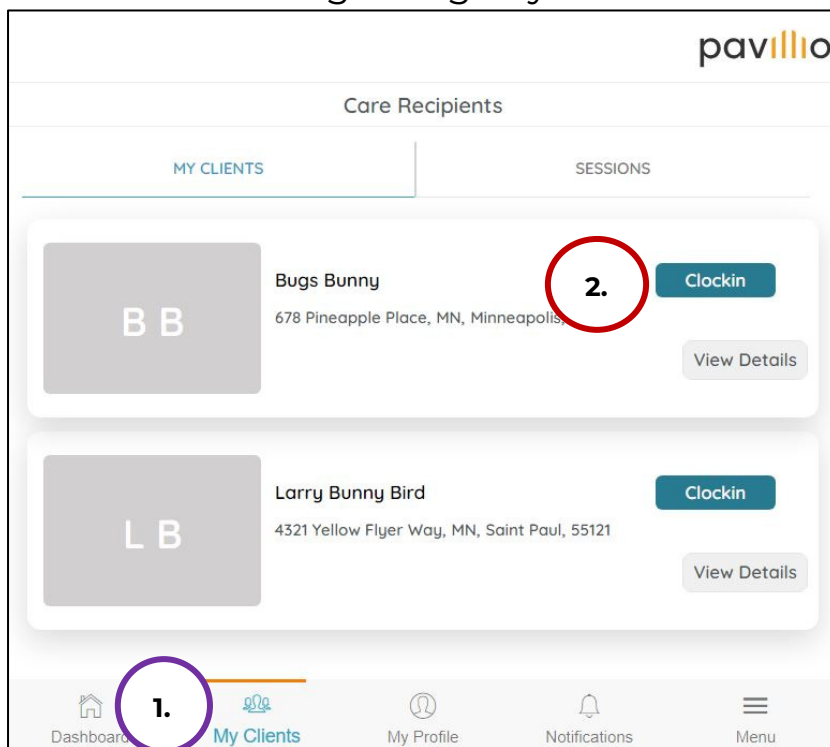   b. Enter your temporary password into the **Password** box.

14. Select **Login**

HOW TO USE PAVILLIO EVV

HOW TO CLOCK IN

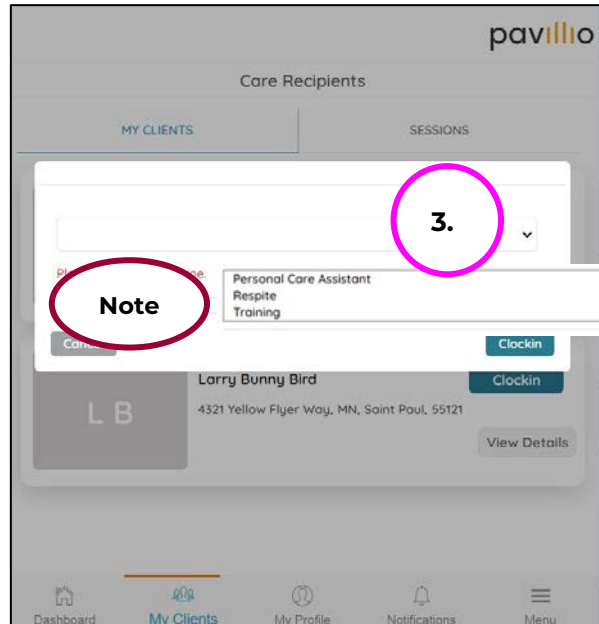1. Select **My Clients**, the 2nd icon from the left located at the bottom
2. Directly to the right of the Participants name, select **Clockin** to clock in at the beginning of your shift

3. Select the **service** you are providing.

   NOTE: the services listed are unique to the participant you support. If you _only_ provide one service, it will default to that service. Continue to Step 4.

4. Select **Clockin**
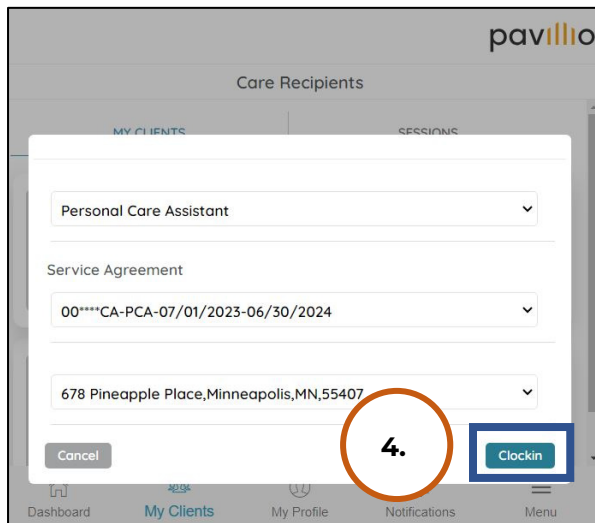
5. If your clock in was successful, you will receive a message **Service successfully started**. You can now start your shift with the participant.
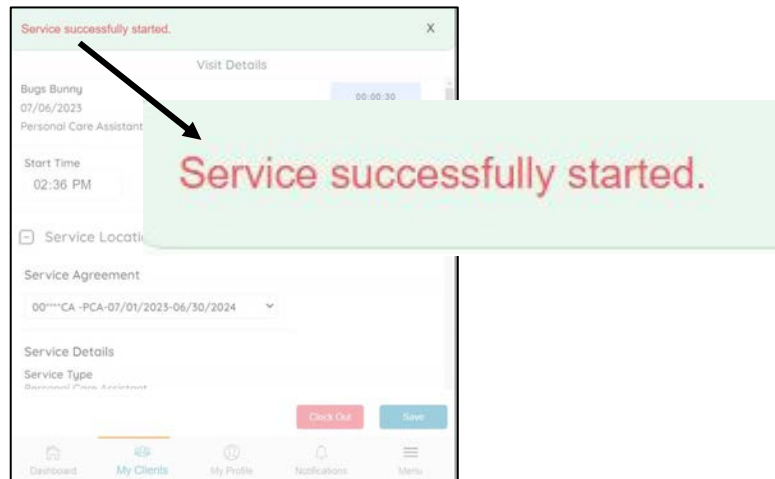
6. You will automatically be navigated to the following screen.
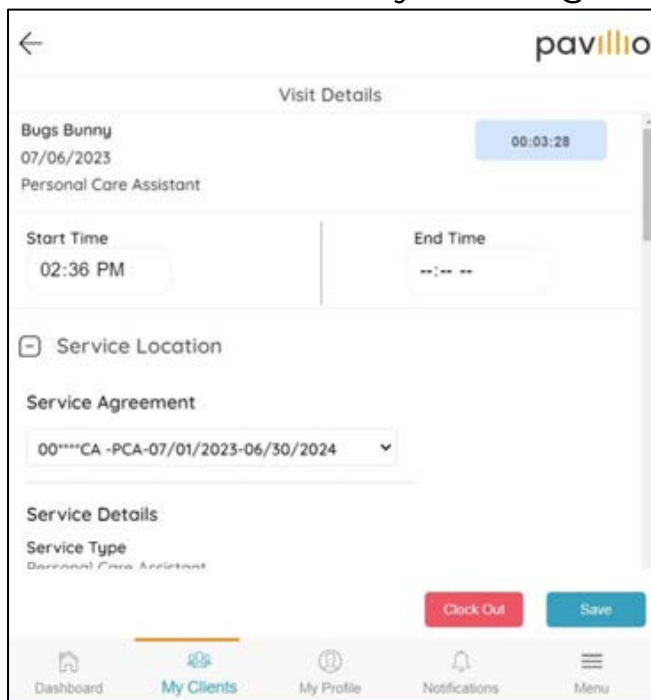
NOTE: There is no need to keep the app or website open while working your shift. Please log out.

a. Select **Menu**
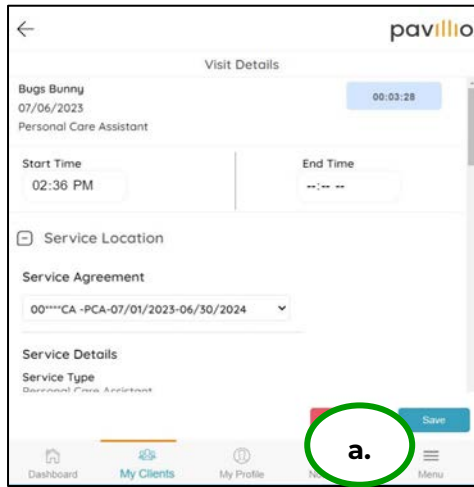
b. Select **Logout**
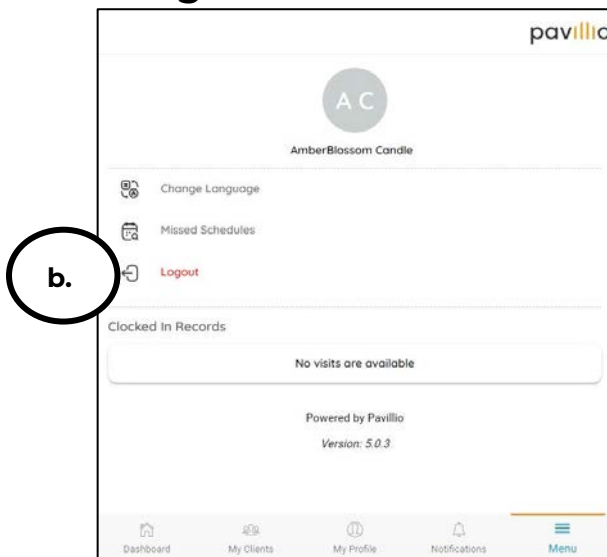
HOW TO CLOCK OUT

1. Log in to Pavillio EVV.
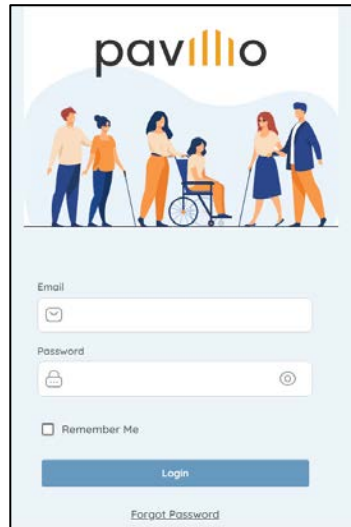
2. Select **Clock Out** in the upper right corner
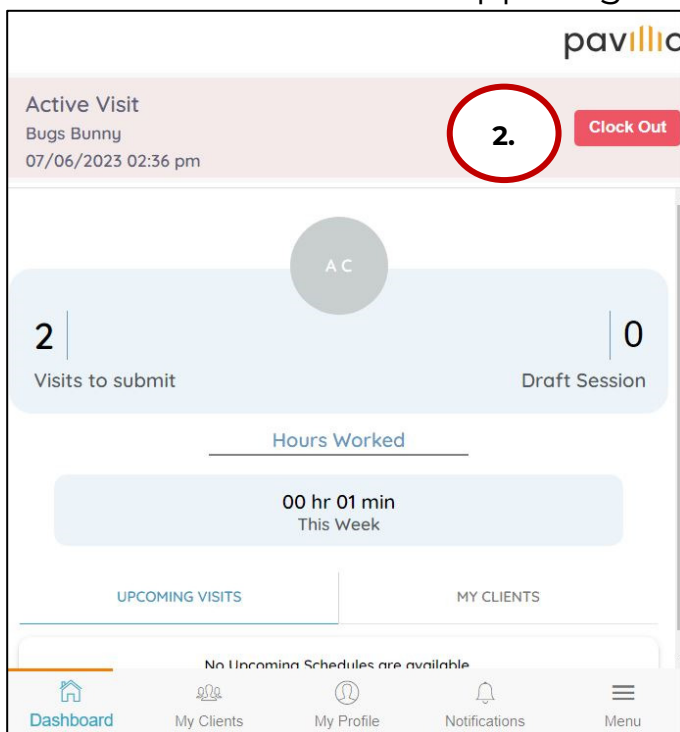
3. In the **Do you want to end this Timesheet?** box, select the **YES** text displayed in the lower right corner.
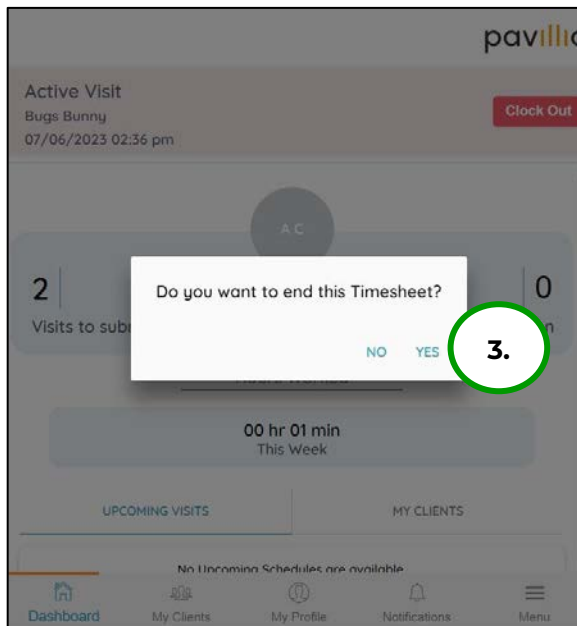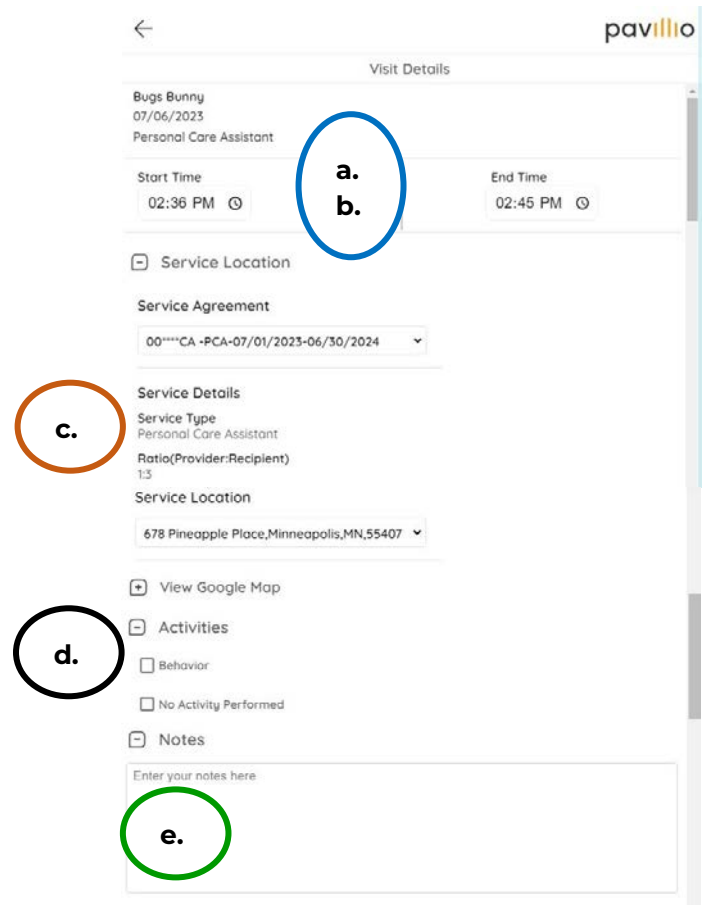
4. If your clock out was successful, you will receive a message **Service ended for the selected Client**.
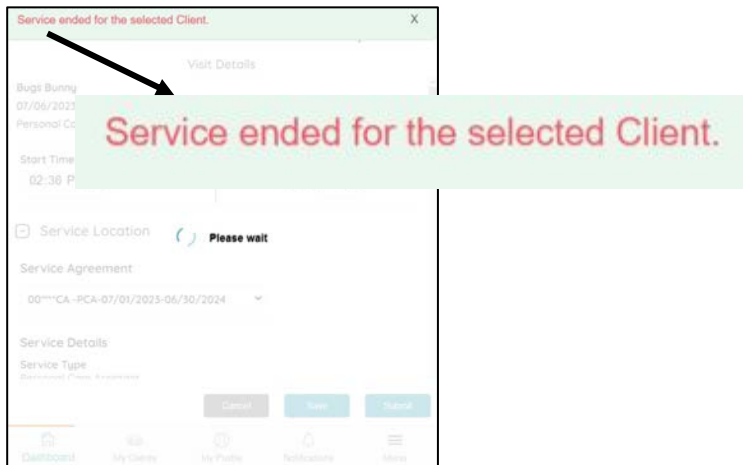
5. Review the following details are accurate:
   a. **Start Time**
   b. **End Time**
   c. **Service Type**
   d. Select the **Activities** you provided during your shift

NOTE: the activities listed are unique to the participant you support. If you have further questions connect with your Responsible Party and/or reference **Commonly Asked Questions > WHAT ACTIVITY SHOULD BE CHOSEN?**

   e. In the **Notes** section, type the details about your shift that you would like to share with the Responsible Party or participant. OR enter **NA** (not applicable).

HOW TO SIGN AND SUBMIT FOR APPROVAL

**There are 2 options for Signing and Submitting your time listed in this section:

Option 1 – Sign and Submit to the Responsible Party for Approval

Option 2 – Sign, Submit, AND Responsible Party Approves at the same time

OPTION 1 – SIGN AND SUBMIT TO RESPONSIBLE PARTY FOR APPROVAL

1. Use your touch screen or your mouse to **sign** your name inside of the Employee Signature box.

    NOTE: If you make a mistake, you can clear your signature by selecting the **Clear Signature** text displayed at the bottom of the box

Lifeworks
A nonprofit serving
people with disabilities

2. Select **Not Available**
3. Select the **Submit** button.

4. You will see the message **Timesheet has been Submitted successfully** to confirm the shift has been submitted to the Responsible Party for approval
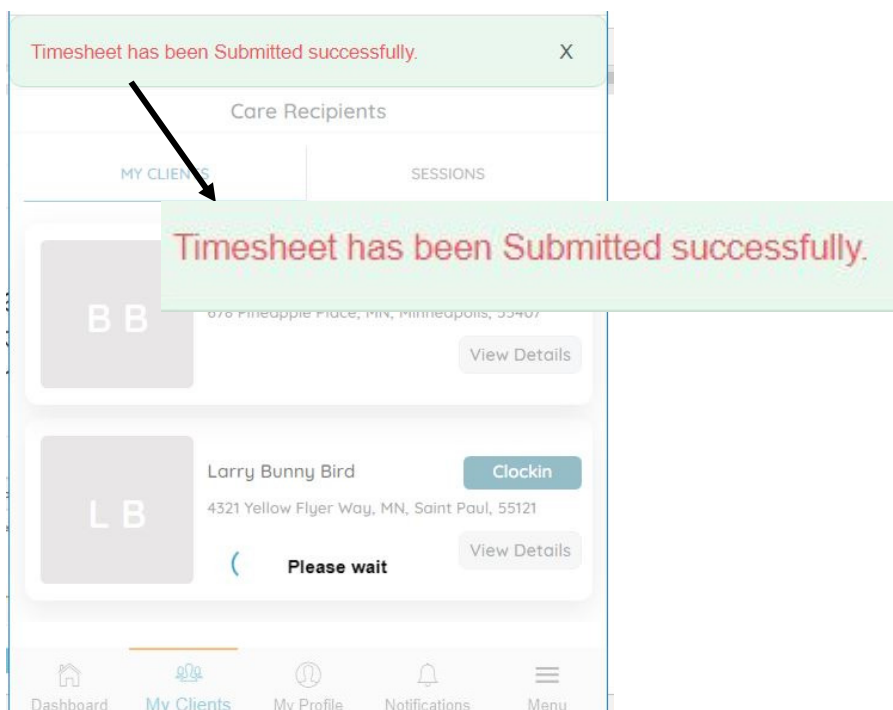
OPTION 2– SIGN, SUBMIT, <u>AND</u> RESPONSIBLE PARTY APPROVES AT THE SAME TIME

*Use this option if your Responsible Party <u>IS</u> present at the end of your shift while clocking out.

1. Use your touch screen or your mouse to **sign <u>your</u>** name inside of the Employee Signature box.

   > ***NOTE***: If you make a mistake, you can clear your signature by selecting the **Clear Signature** text displayed at the bottom of the box
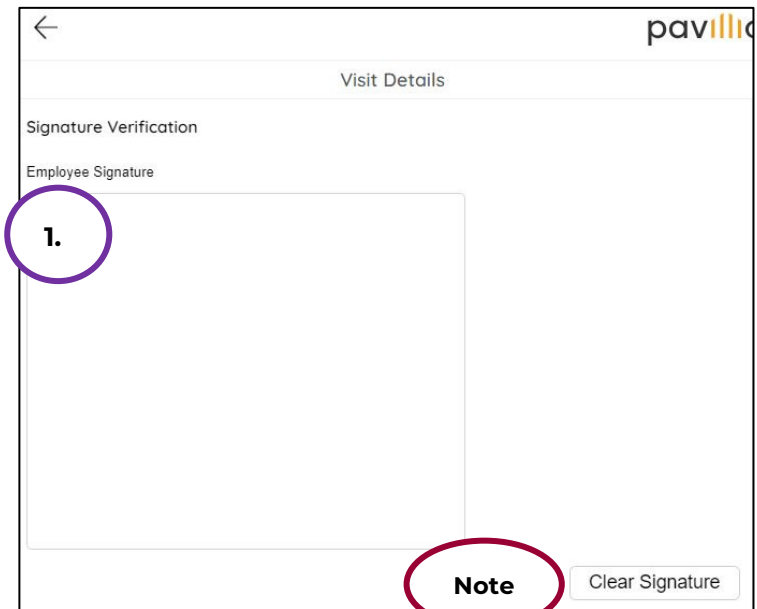
2. Select the **Responsible Party** box; it will turn blue once selected

3. *(If applicable)* Select the Responsible Party's name from the **drop-down menu**
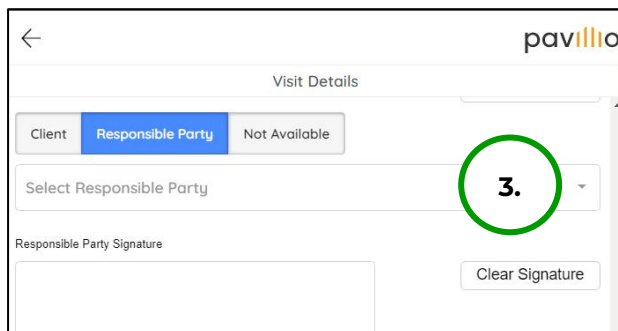
   a. Select the name of the **Responsible Party** that is present
   b. Select **OK**
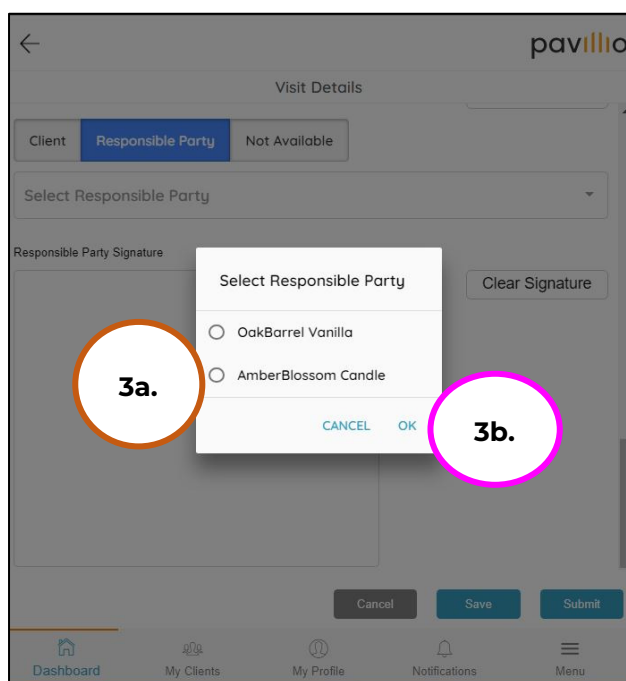
4. Hand your device to the Responsible Party
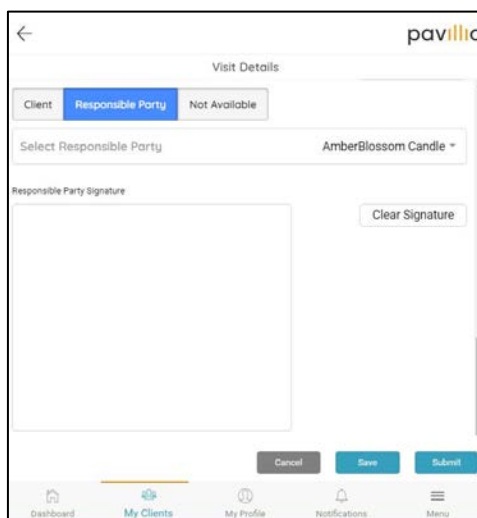
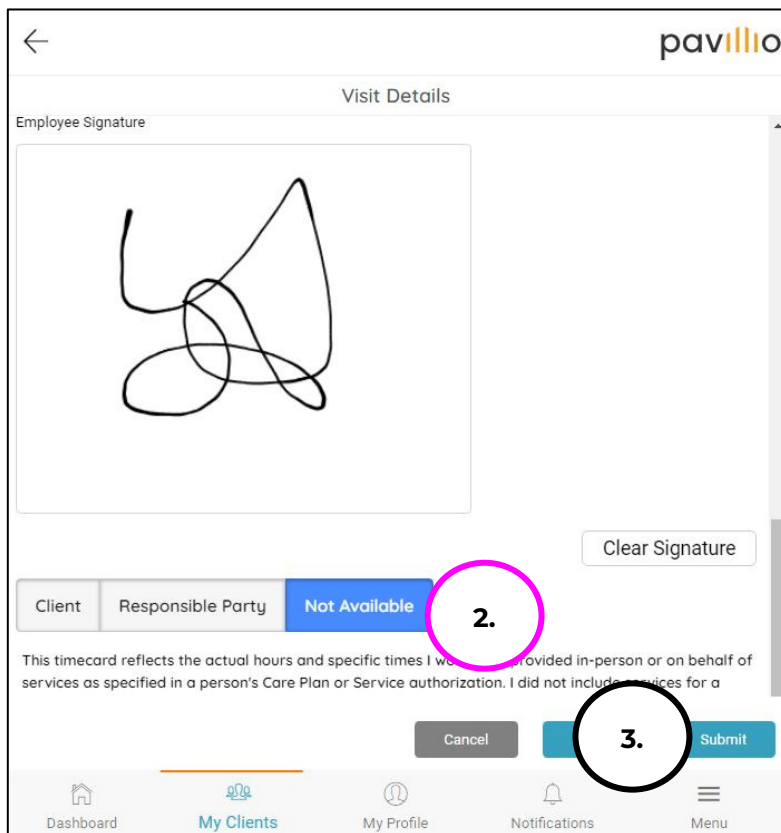5. The **Responsible Party** will use your touch screen or your mouse to **sign** their name inside of the text box.

> **NOTE**: If you make a mistake, you can clear your signature by selecting the **Clear Signature** text displayed at the bottom of the box

6. Responsible Party enters their **4-digit PIN**

7. Select the **Submit** button.
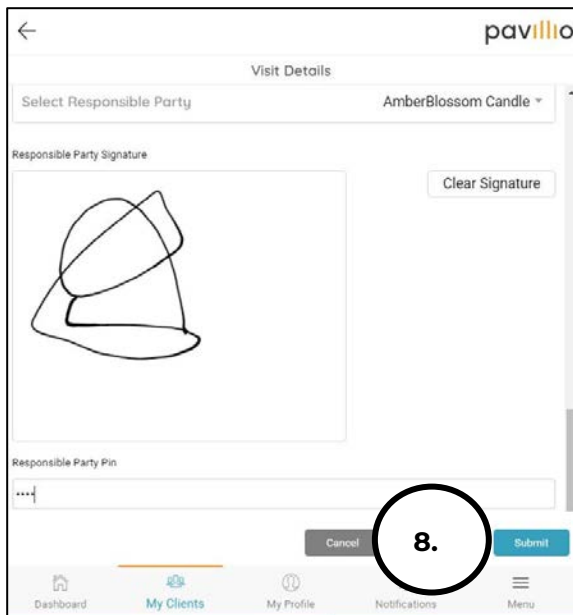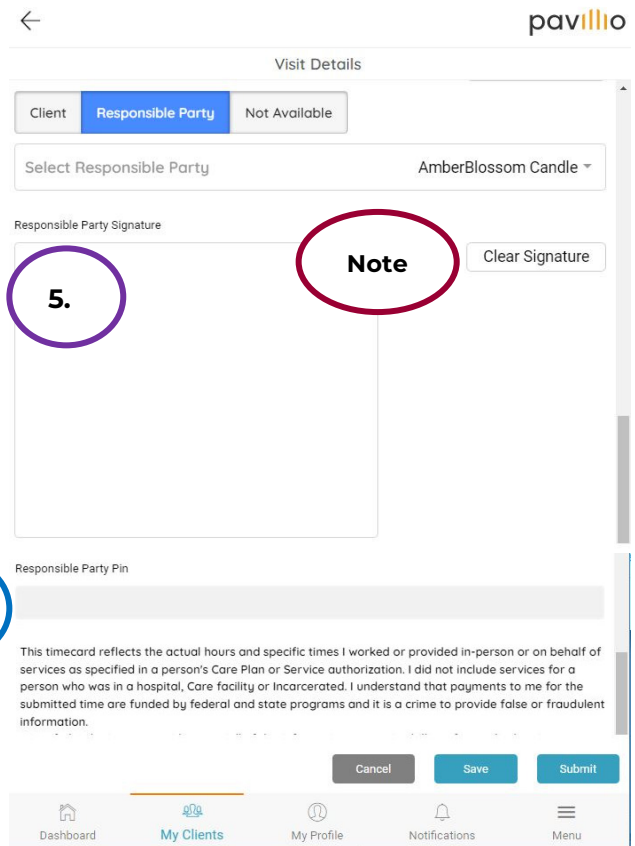
8. You will see a **Timesheet has been Approved successfully** message to confirm it has been submitted to our Timekeeping Team for processing.
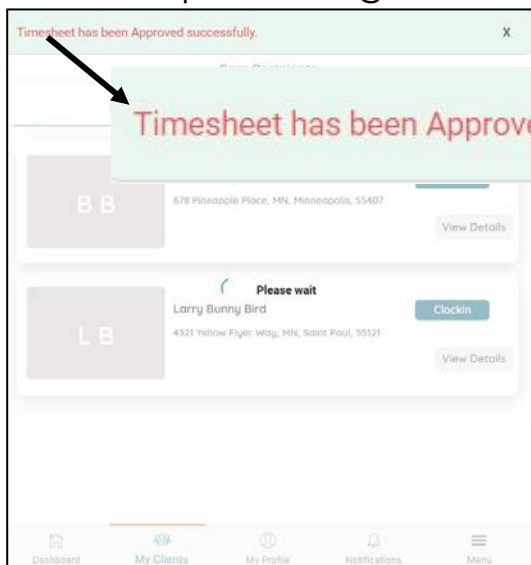
HOW TO EDIT REJECTED TIME ENTRIES

A Rejected timecard is when you, as the employee, have an error on the timecard you submitted to the Responsible Party for approval. The Responsible Party has rejected the timecard so you can make the necessary corrections.

1. Select **Visits to submit** located on the Dashboard

   NOTE: Visits to submit could be timesheets you have not yet completed OR they could be timesheets that have been rejected by the Responsible Party
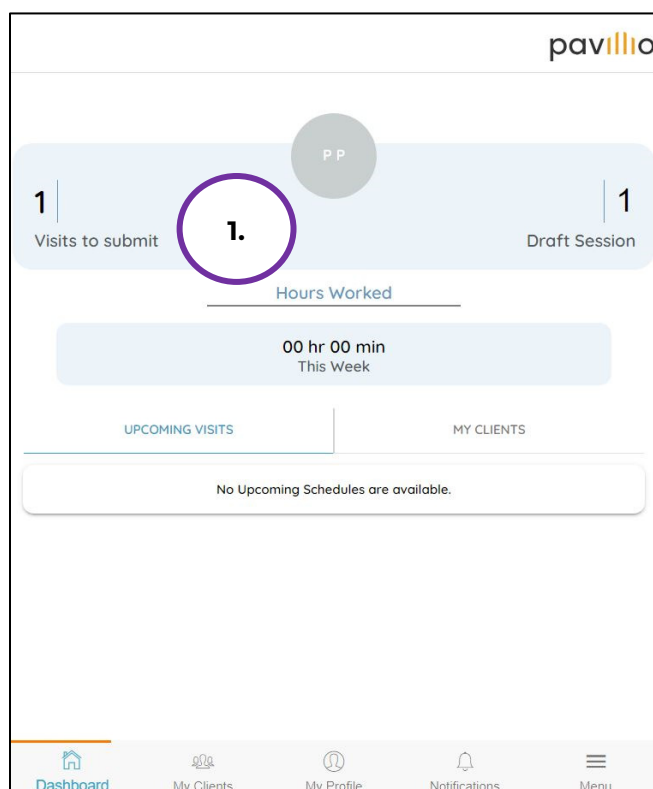
2. Under **Complete Visit** select **DRAFT TIMESHEETS**
3. Under **DRAFT TIMESHEETS** locate the Timesheet that is **RED**.
4. Review the **reason** listed in red for an explanation of the rejected timesheet from the Responsible Party so you know what needs to be corrected.
5. Select **Edit** in the upper right corner of the rejected timesheet.
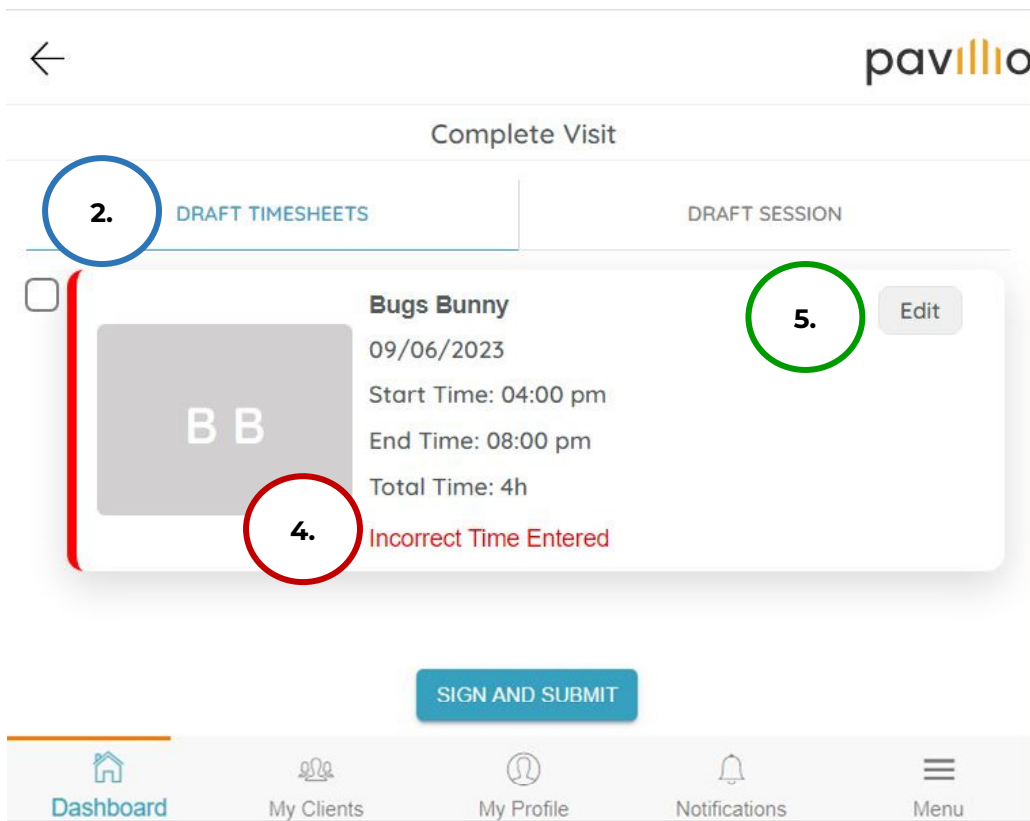
6. Per the Responsible Party's note, make the necessary corrections.

NOTE: Only Time, Activities, & Notes can be edited. If something else needs to be edited please reach out to our technical team at CasheSupport@lifeworks.org

7. After the corrections have been made, select **Save**.
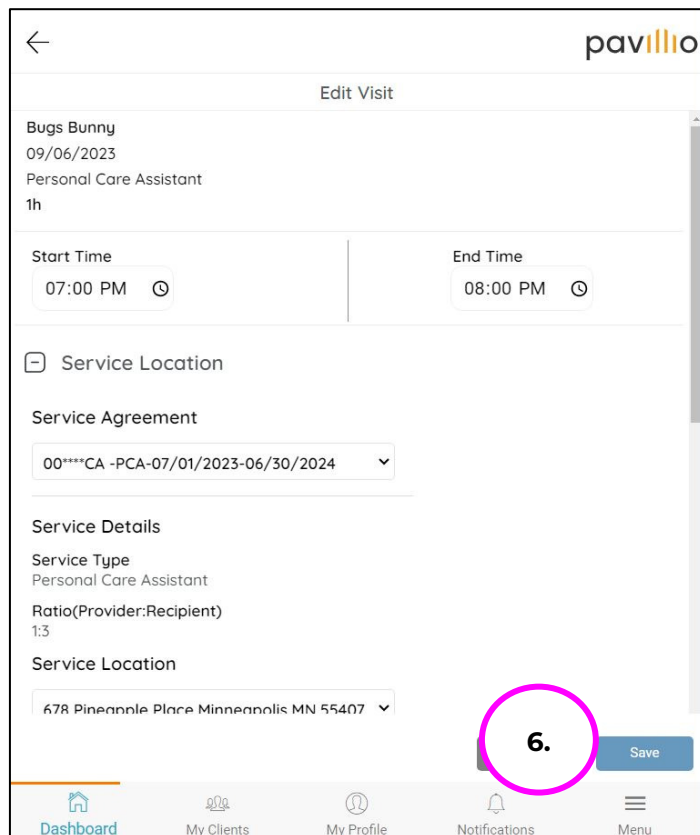
8. You will see a **Timesheet has been Updated successfully** message to confirm that your entry has been successfully edited
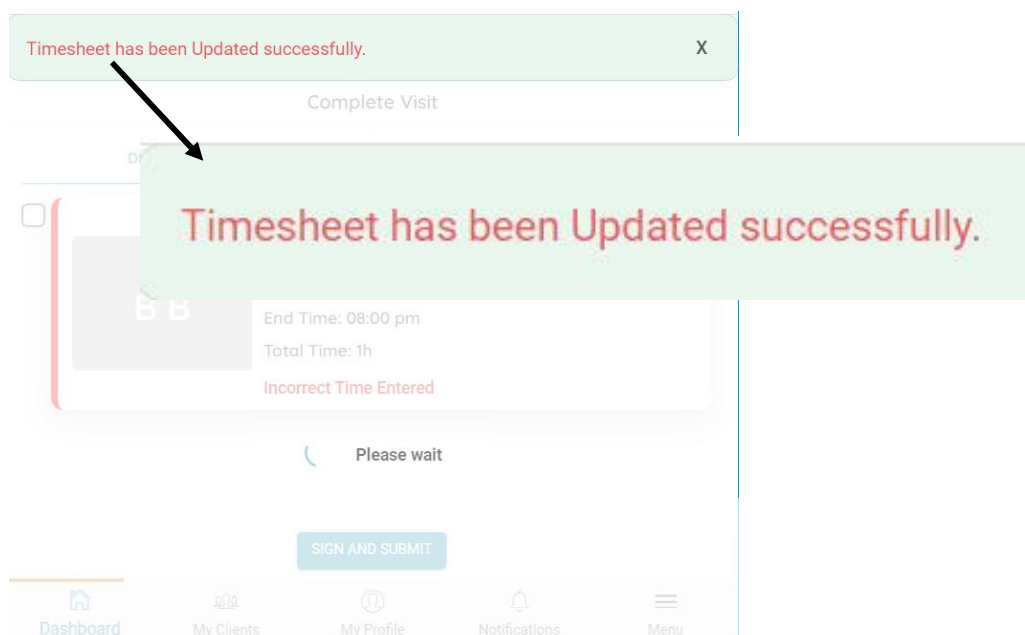
9. Select the **checkbox** to the left of the corrected timesheet
10. Select **SIGN AND SUBMIT**.
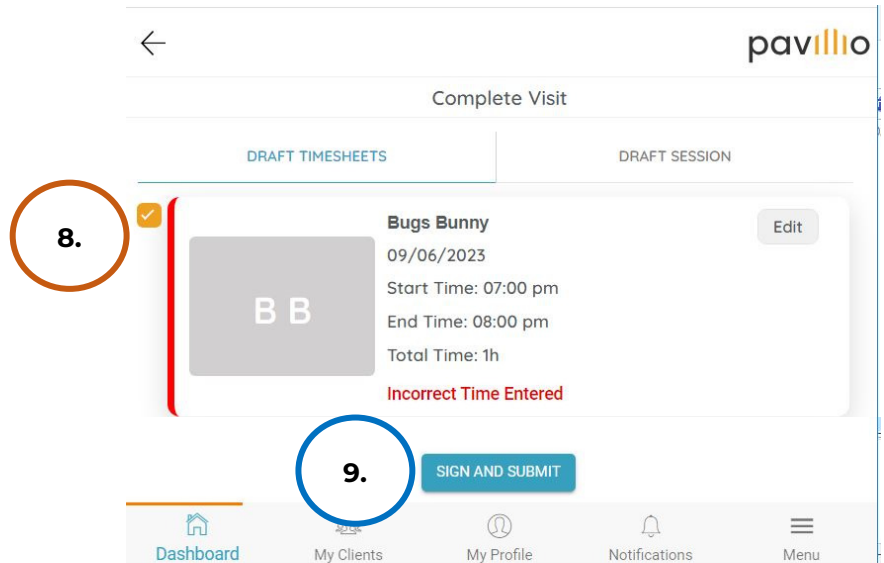
11. Use your touch screen or your mouse to **sign** your name inside of the Employee Signature box.

   NOTE: If you make a mistake, you can clear your signature by selecting the **Clear Signature** text displayed at the bottom of the box

12. Select **SUBMIT**
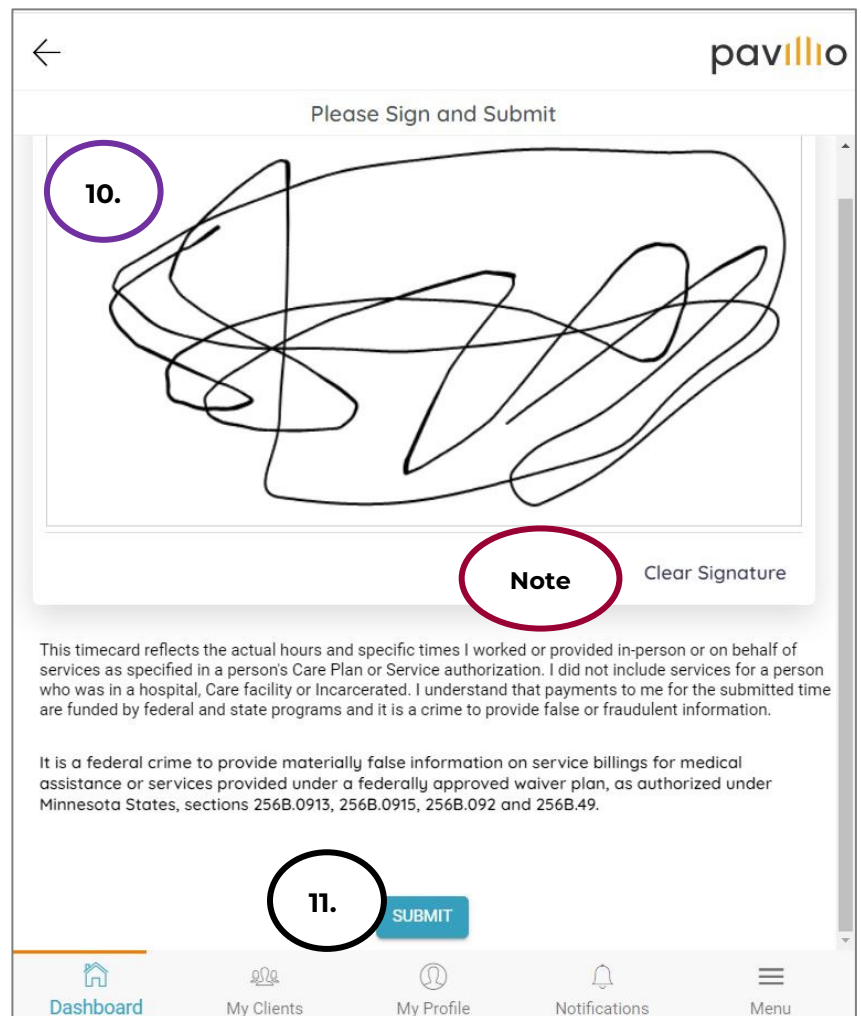
13. You will see a message **Timesheet has been Submitted successfully** and it will no longer be listed on the under DRAFT TIMESHEETS.
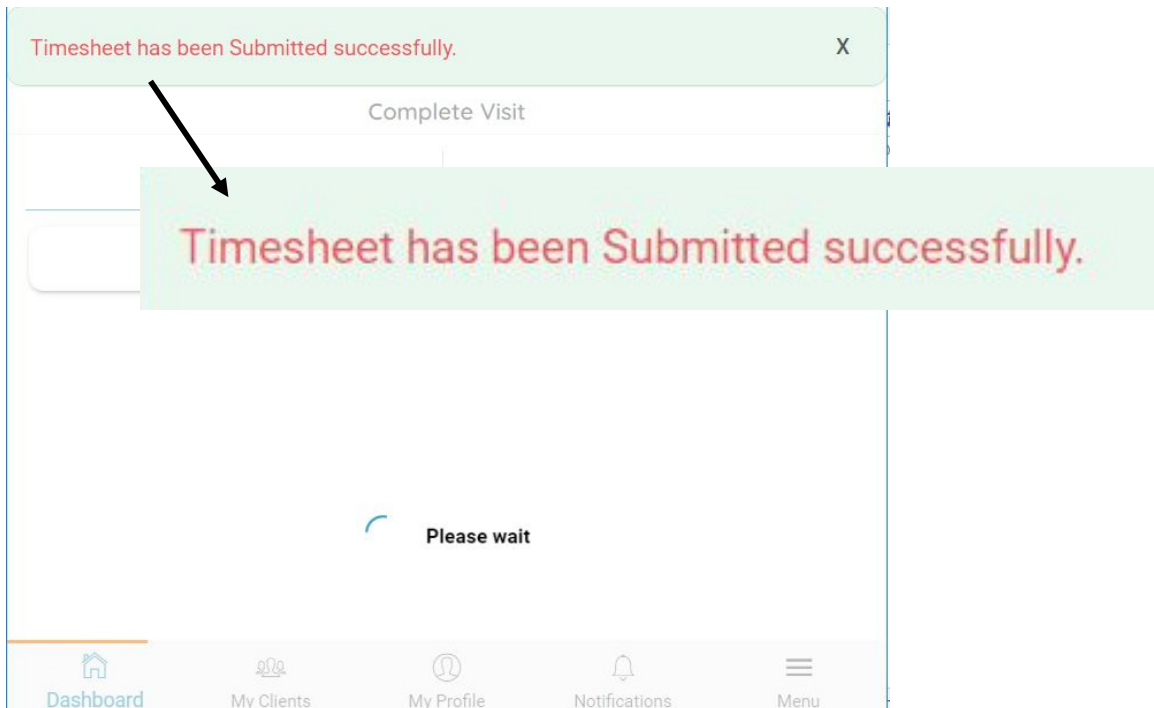
HOW TO EDIT INCOMPLETE TIME ENTRIES (TEMPORARILY ALLOWED)

An Incomplete timecard is when you, as the employee, have NOT yet submitted the timecard to the Responsible Party for approval.

Best practice for recording your time is to clock in at the beginning of your shift and clock out at the end your shift. *Once EVV is implemented, it is Lifeworks' understanding that the edit feature will no longer be allowed.*

1. From the Dashboard select **Visits to submit**

    NOTE: Visits to submit could be timesheets you have NOT yet completed OR they could be timesheets that have been REJECTED by the Responsible Party
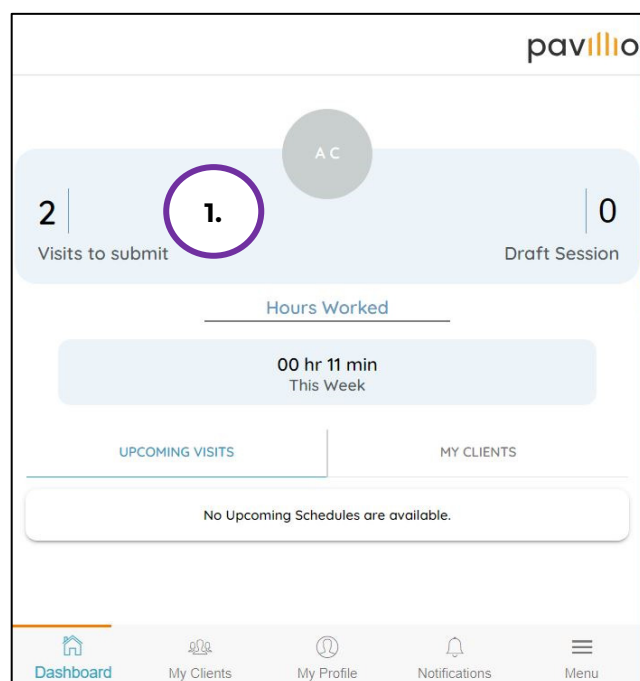
2. Under **Complete Visit** select **DRAFT TIMESHEETS**

3. Under **DRAFT TIMESHEETS** locate the **shift** you would like to adjust.

4. Select **Edit** in the upper right side of the shift you wish to edit.

    NOTE: Only Time, Activities, & Notes can be edited. If something else needs to be edited please reach out to our technical team at CasheSupport@lifeworks.org for assistance.
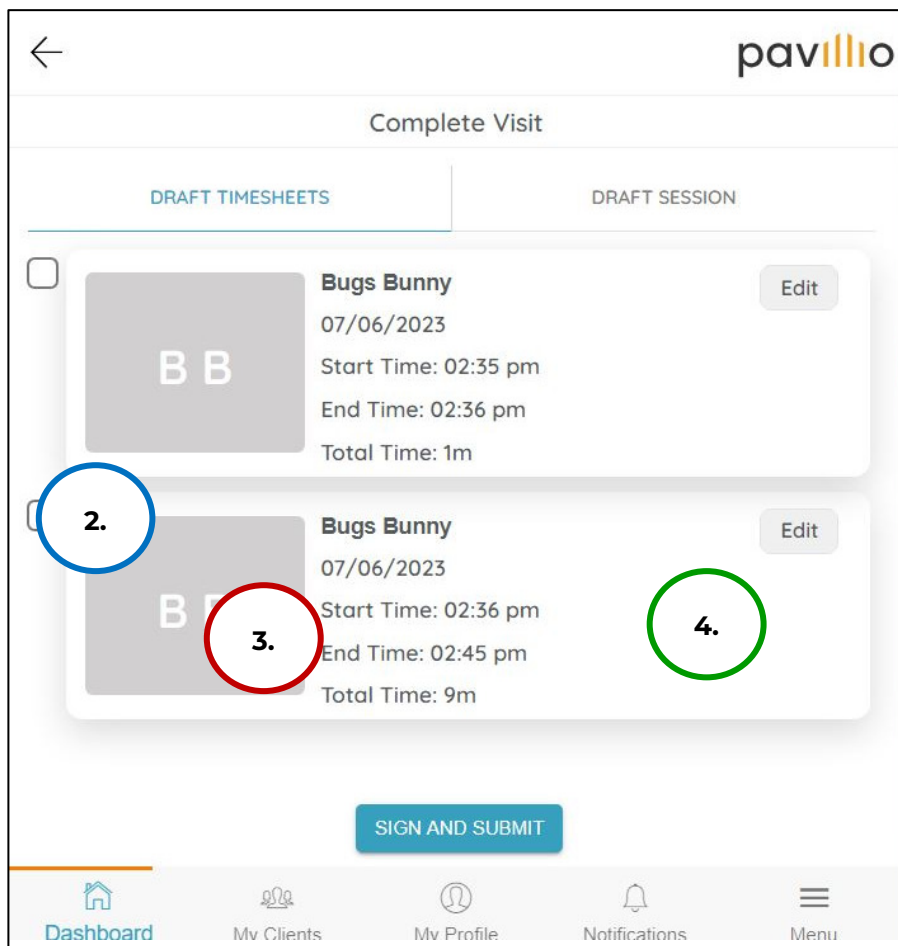
5. After the corrections have been made, select **Save**.
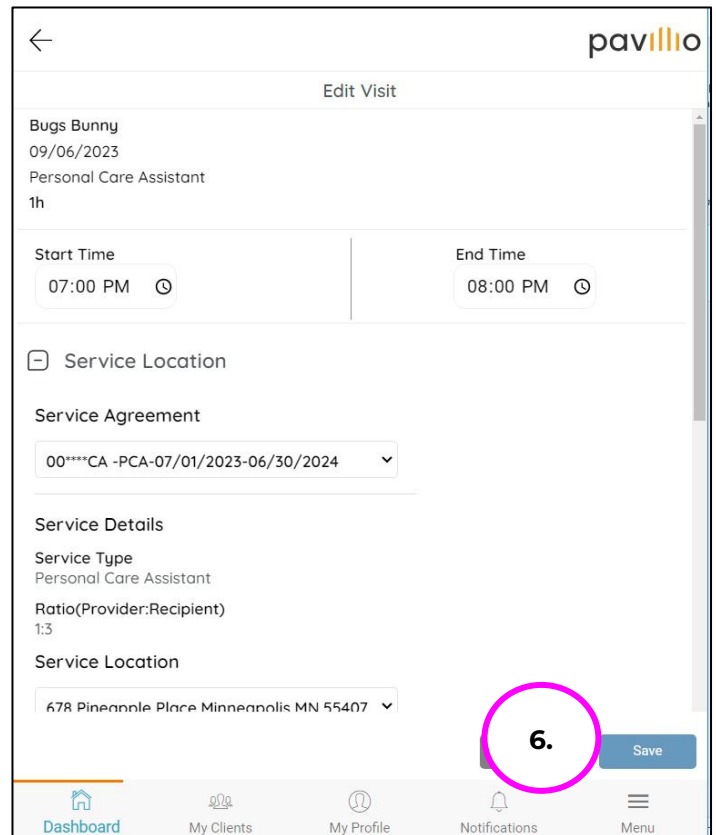
6. You will receive a **Timesheet has been Updated successfully** message to confirm your entry has been successfully edited.
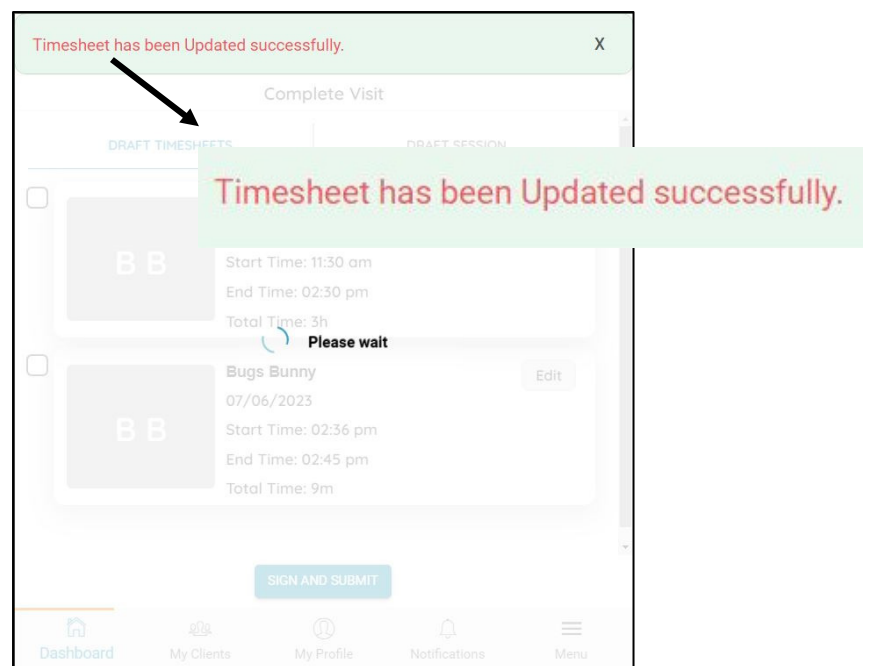
7. Select the **checkbox** to the Left of the edited shift.
8. Select **SIGN AND SUBMIT**
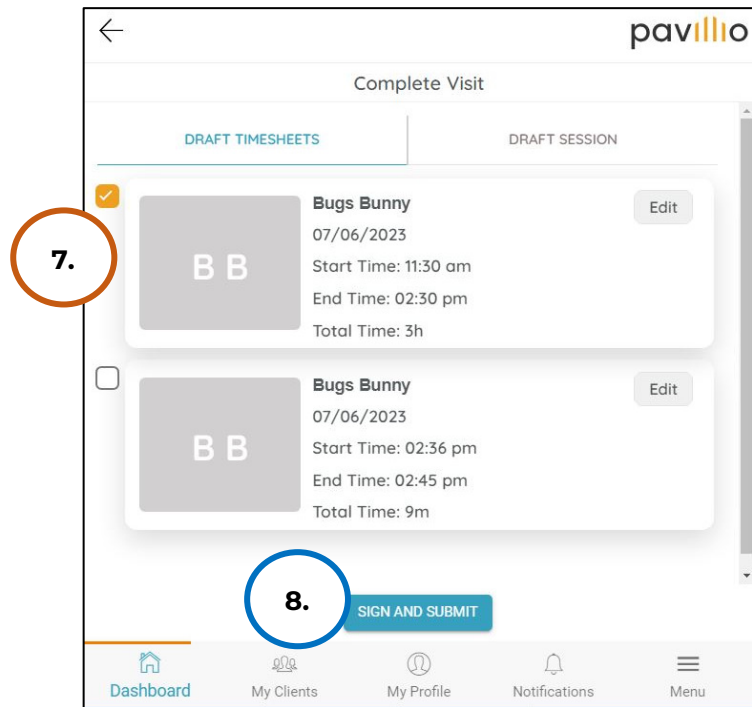
9. In the box Use your touch screen or your mouse to **sign** <u>your</u> name inside of the text box

> *NOTE*: If you make a mistake, you can clear your signature by selecting the **Clear Signature** text displayed at the bottom of the box

10. Select **SUBMIT**
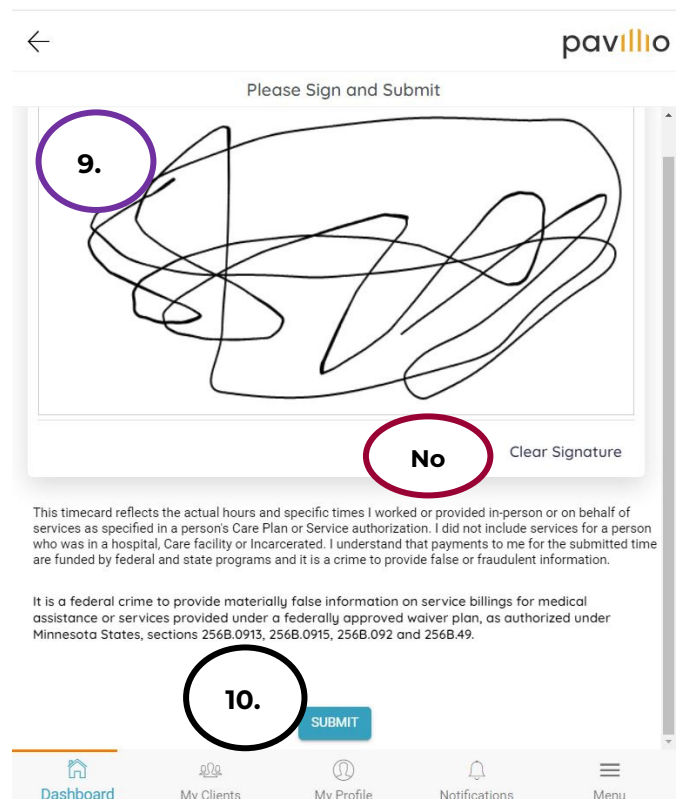
11. You will see a **Timesheet has been Submitted successfully** message to confirm it has been submitted to your Responsible Party team for approval
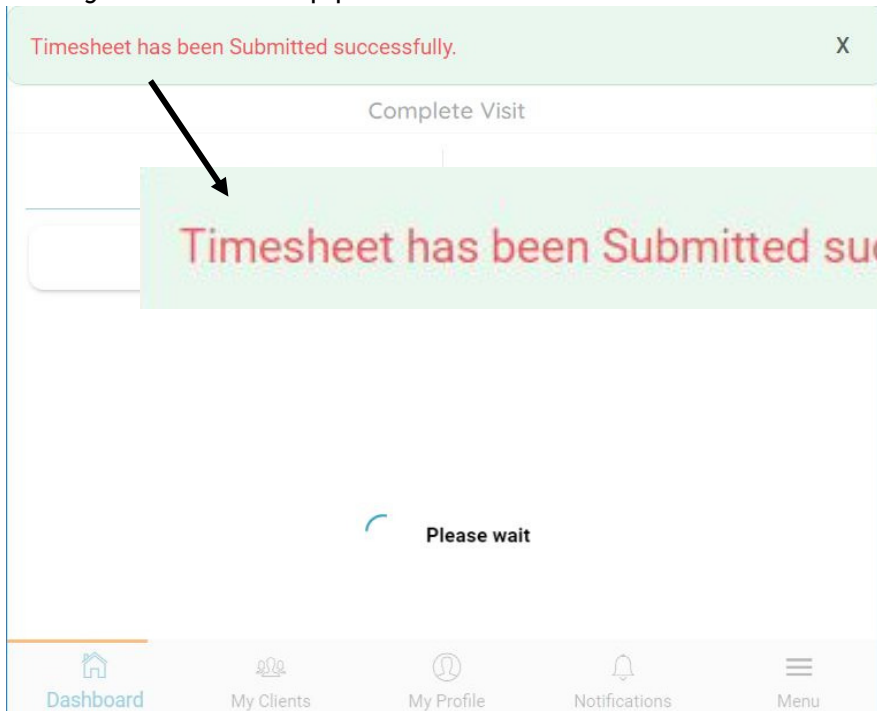
HOW TO ADD TIME AFTER YOUR SHIFT (TEMPORARILY ALLOWED)

Best practice for recording your time is to clock in at the beginning of your shift and clock out at the end your shift. Once EVV is implemented, it is Lifeworks' understanding that the edit feature will no longer be allowed. For more information about EVV, please refer to About Pavillio EVV.

1. Select **My Clients**, the 2nd icon located at the bottom.
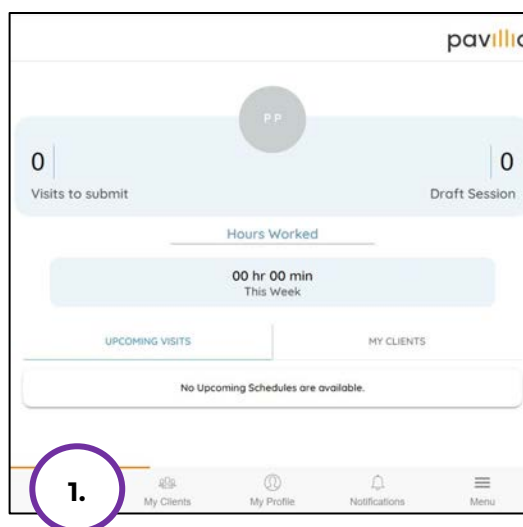
2. Select **View Details** to the right of the Participant's name you need to add a shift for.
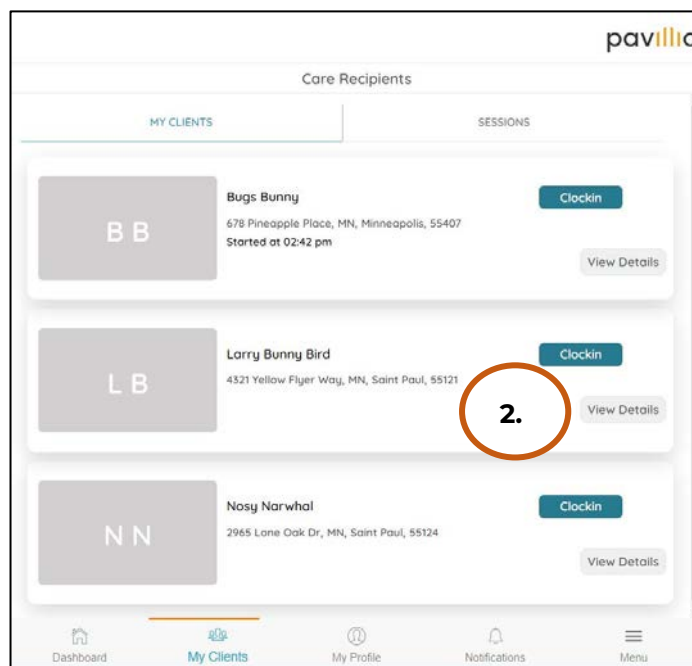
3. Select **Add Manual Visit**, you may need to scroll down
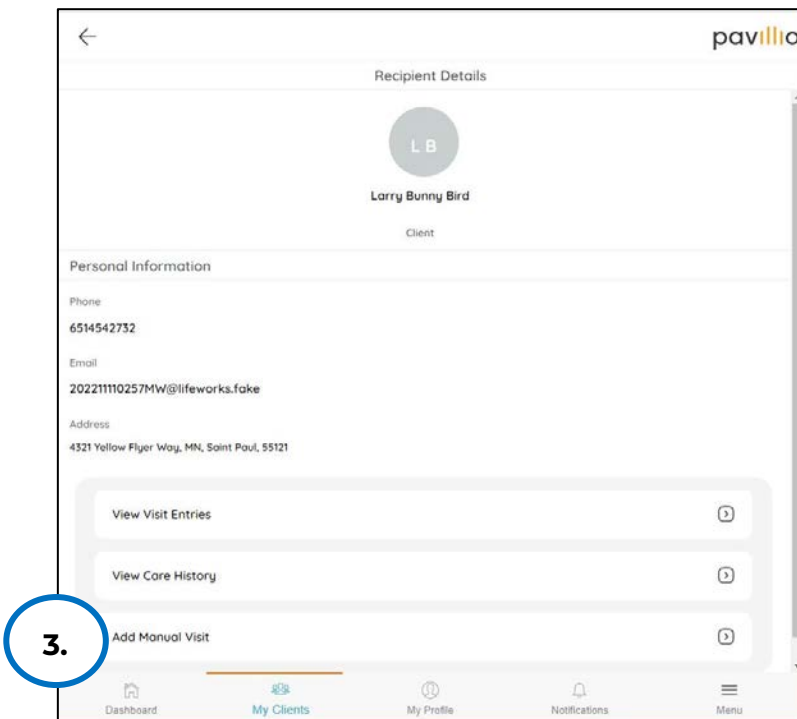
4. *(If applicable)* Choose the service from the **Select Services** list that you will provide

NOTE: If you only provide 1 service there will not be an option to choose
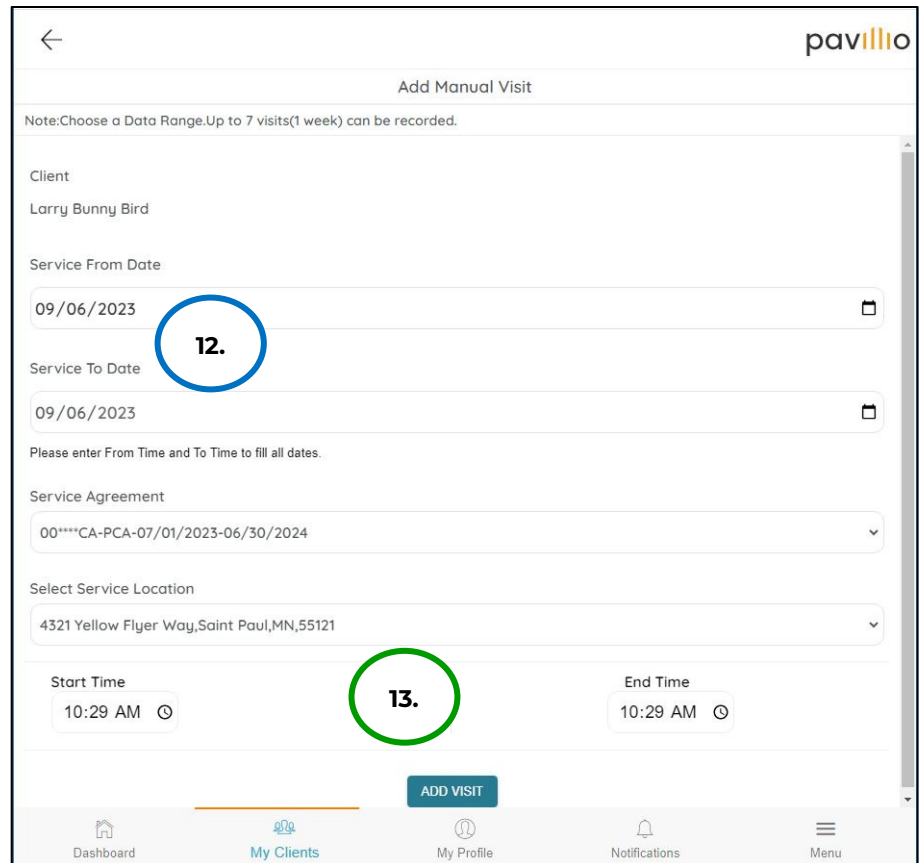
5. Select **ADD VISIT**
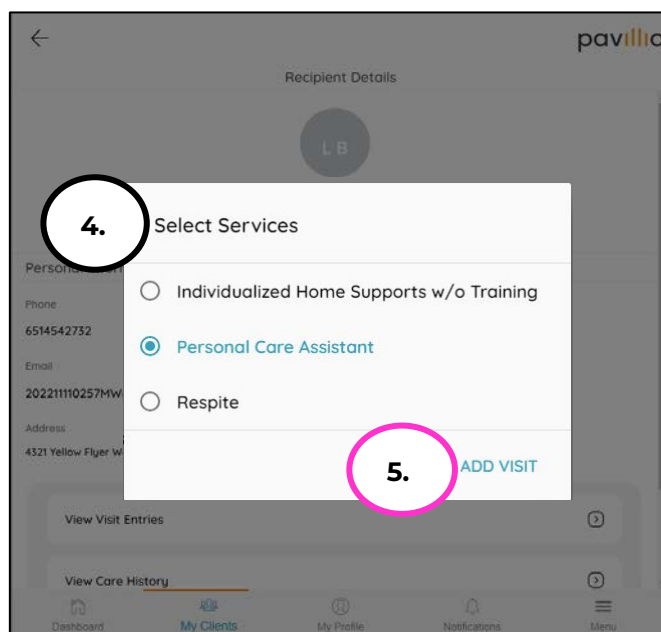
6. Edit the following details to match the shift you are manually entering:

    a. **Service From Date**
    b. **Service To Date**
    c. **Start Time**
    d. **End Time**

7. Review the Dates & Times have been entered correctly.
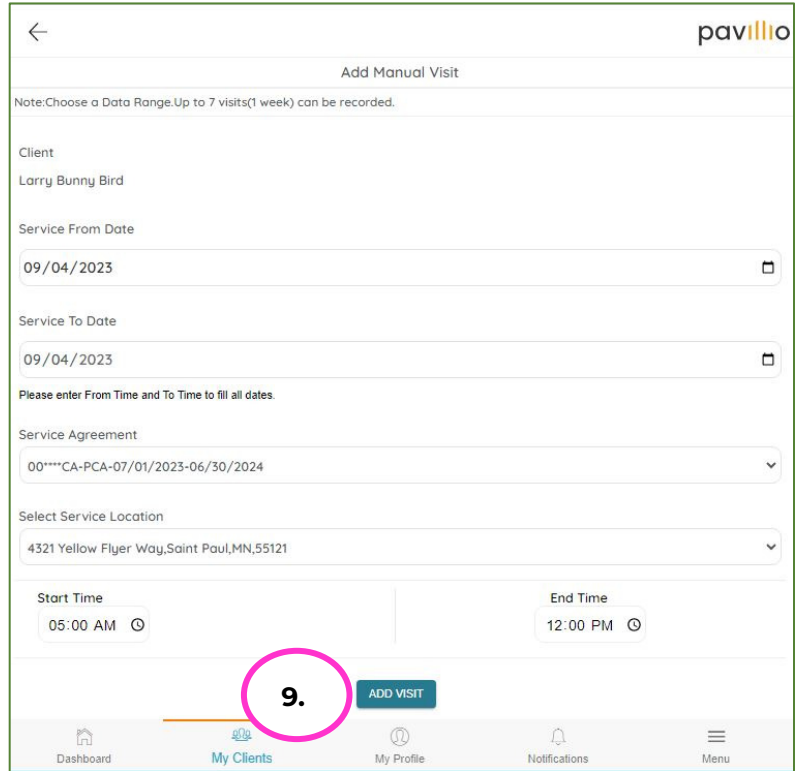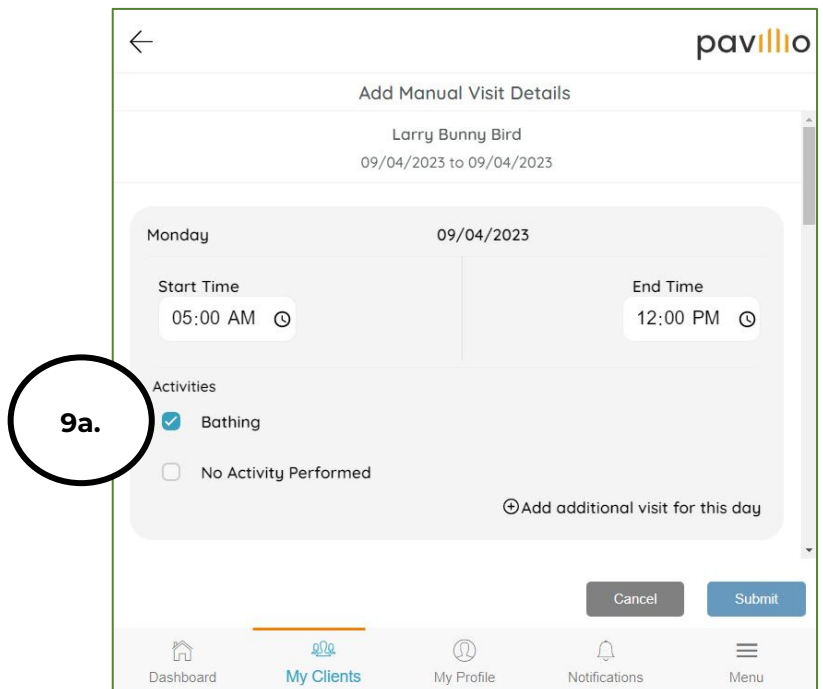
8. Select **ADD VISIT**

9. Complete the following required information:
   a. Select the **Activities** provided during your shift

   b. In the **Notes** section, type the details about the shift that you would like to share with the Responsible Party or Participant, OR enter **NA** (meaning not applicable).

c. Use your touch screen or your mouse to **sign** your name inside of the text box.

> ***NOTE***: If you make a mistake, you can clear your signature by selecting the **Clear Signature** text displayed at the bottom of the box

10. Select the **Not Applicable** box.

> **NOTE**: A Responsible Party CAN use their PIN to approve this time entry. Before continuing with Step 21, reference **Option 2: Sign, Submit, <u>AND</u> Responsible Party Approves** for the correct steps.

11. Select **Submit**
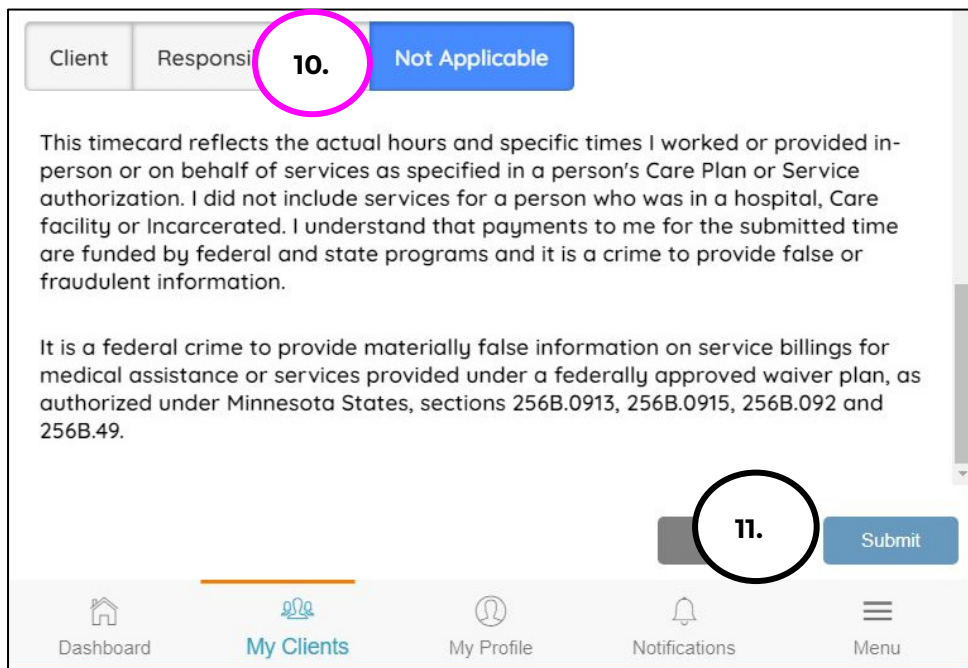
12. You will see the message **Timesheet has been Submitted successfully** which confirms the entry has been submitted to your Responsible Party for approval.
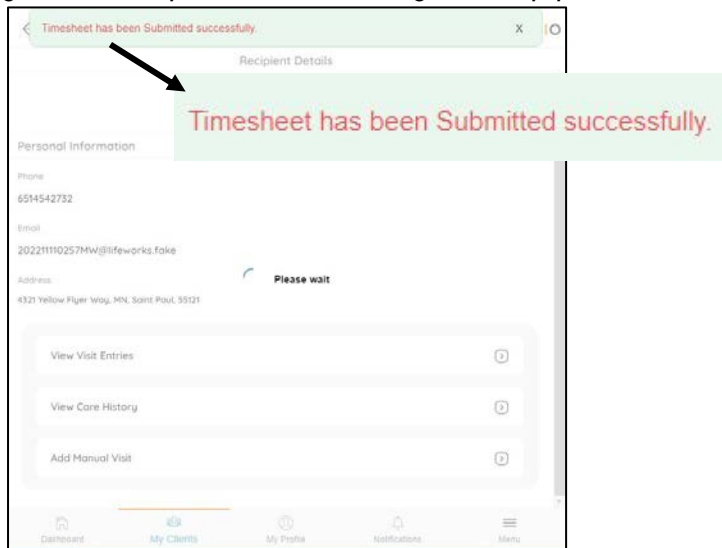
COMMONLY ASKED QUESTIONS
WHO CAN I CONTACT TO ANSWER PAVILLIO EVV RELATED QUESTIONS?

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 Responsible Party (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/.

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 Pavillio EVV app. If you are using your computer, use the Google Chrome browser to type the website https://evv.cashesoftware.com/app/.
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.

HOW TO CHANGE YOUR PREFERRED LANGUAGE

1. Select **Menu**
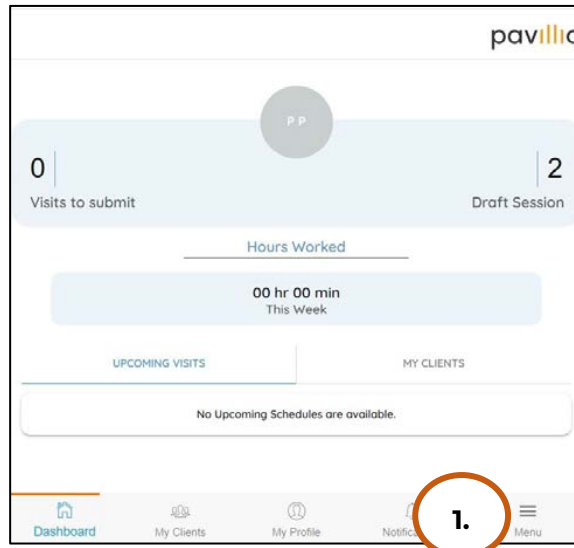
2. Select **Change Language**
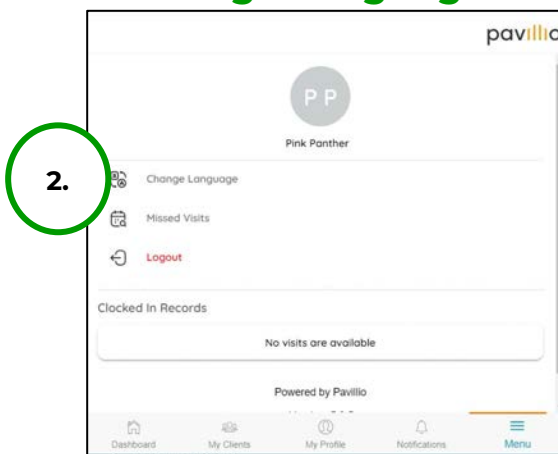
3. Select your **preferred language** from the menu. Languages available include English, Spanish, Somali, Chinese, Russian, Vietnamese, Amharic, Hmong, Lao, Thai.
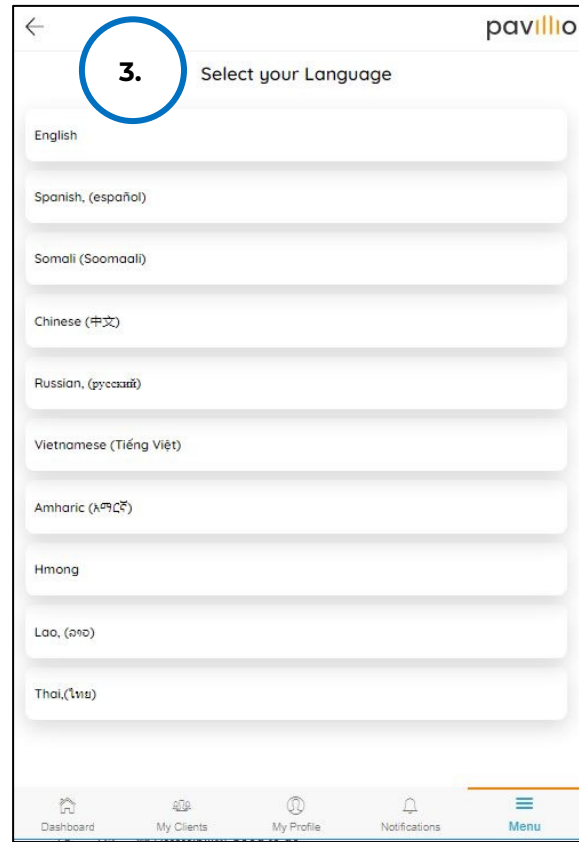
4. There will be a message **Your Language has been Updated successfully**

   NOTE: You may need to refresh for the language to updated.
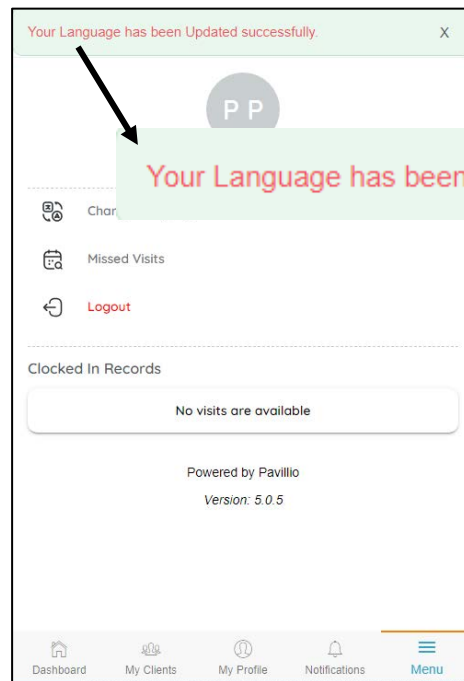
DELETE A TIME ENTRY

If you or your Responsible Party would like to delete a time entry, 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 the time entry details
- Your Full Name
- Your Username
- Name of Your Responsible Party
- 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.

HOW DO I ENTER TIME IF I AM A LIVE-IN CAREGIVER?

As a Live-In Caregiver, you do NOT need to clock in and out in live time. However, you do need to submit manual timesheets for EACH shift DAILY.

Reference **HOW TO ADD TIME AFTER YOUR SHIFT (TEMPORARILY ALLOWED)** to assist with entering past time.

If you are unsure you if you are a Live-In Caregiver connect with your Responsible Party or Service Coordinator.

HOW TO REVIEW TOTAL WEEKLY HOURS WORKED

1. Select **My Profile**, the 3rd button located at the bottom of the dashboard.
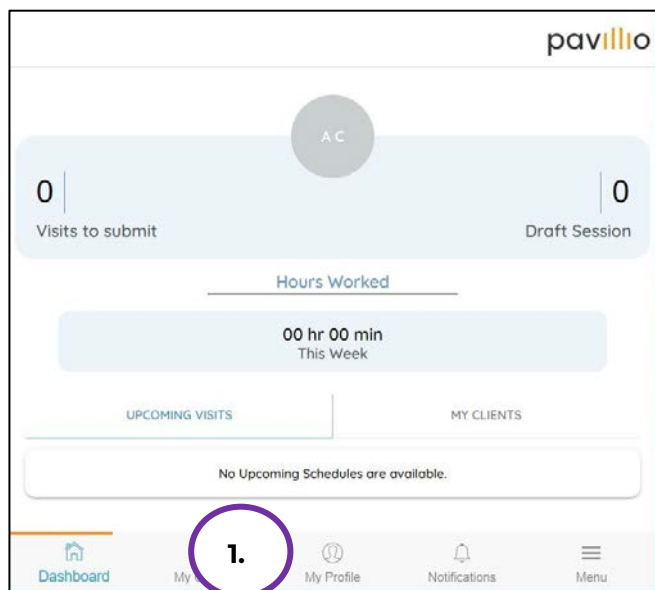
2. Locate **View My work hours**
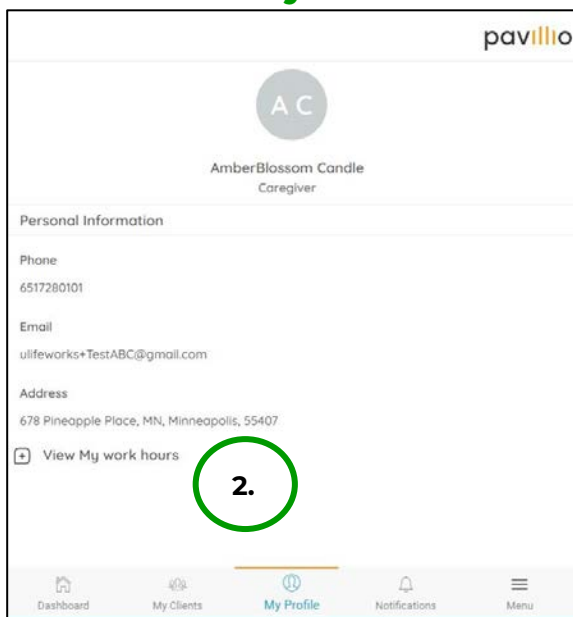
3. Select the **plus (+)** to the left of **View My work hours**
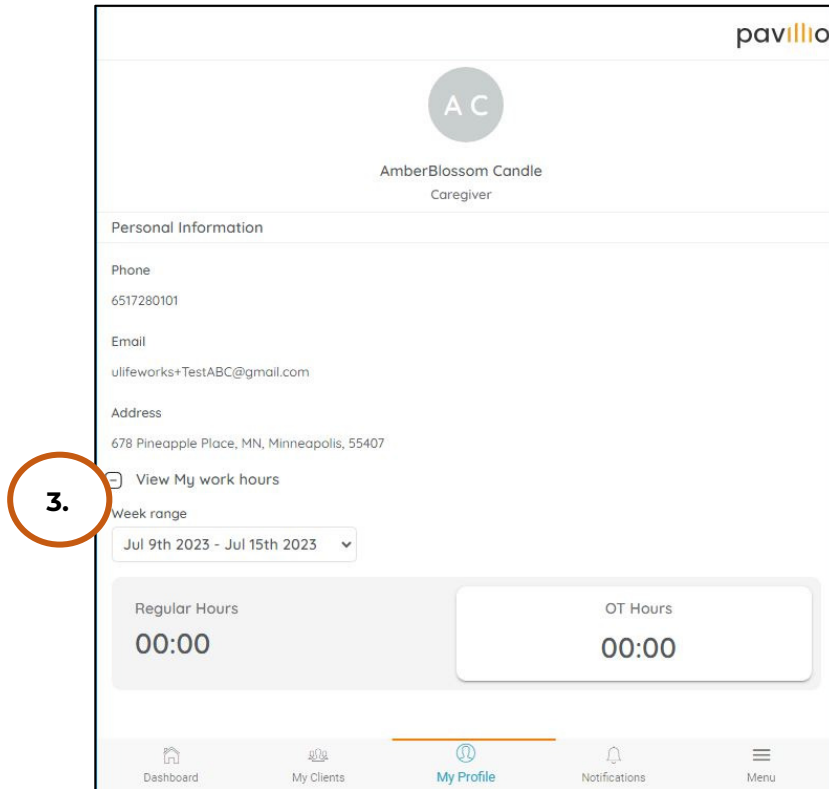
Note: The CURRENT week is display by default. You can select the drop down to view past weeks

Your hours will update automatically once you have created a new timecard

HOW TO VIEW APPROVED AND UNAPPROVED TIME ENTRIES

Below are instructions for how to view your approved and unapproved time entries. **Approved** time entries are those you have signed and submitted, and your Responsible Party has approved. **Unapproved** time entries are those you have signed and submitted, but your Responsible Party has not yet approved them.

NOTE: Once you have signed and submitted your time entries your Responsible Party must sign and approve or reject your entry.

1. Select the **My Clients**; the 2nd icon located at the bottom of the dashboard.
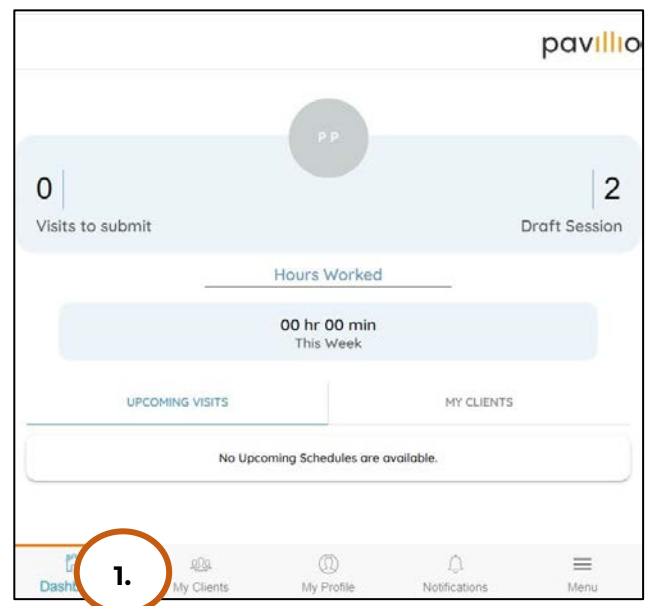
2. Select **View Details** to the right of the Participant's name.
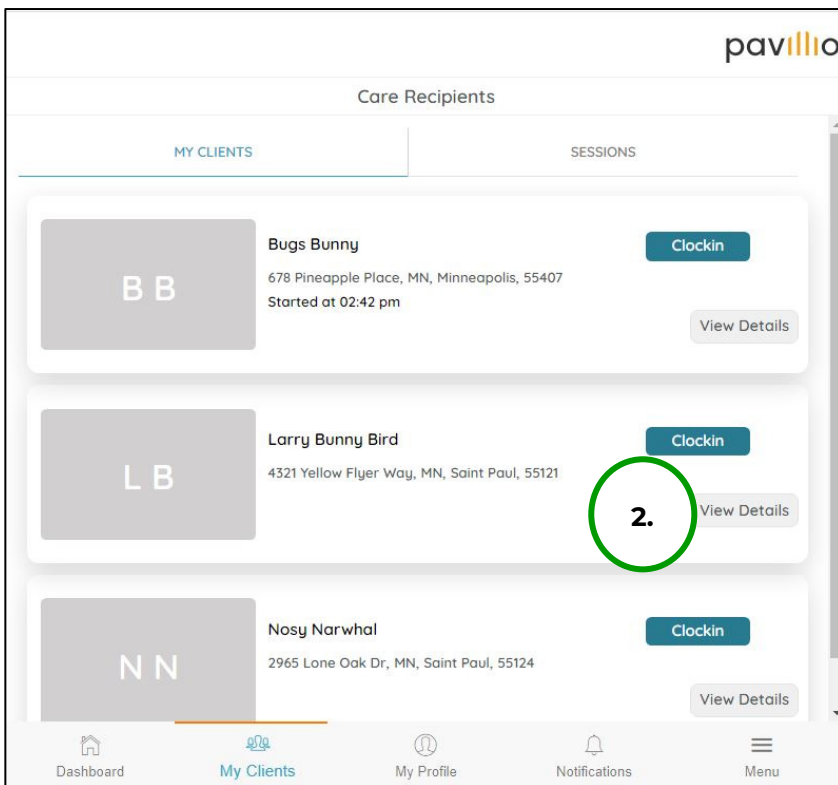
3. Select **View Visit Entries**
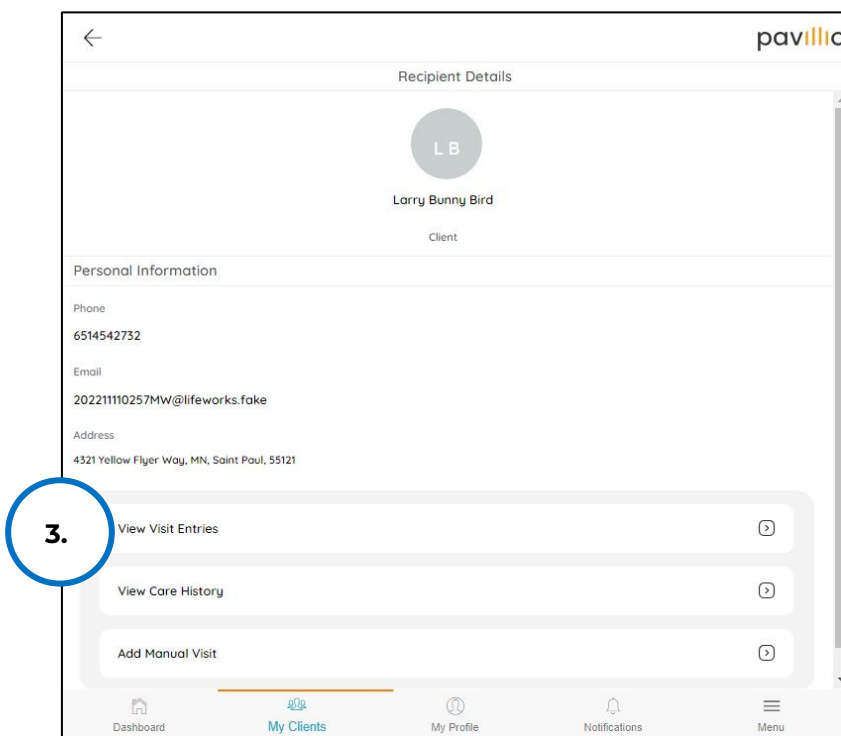
4. Select the **View Details** for month you would like to review.
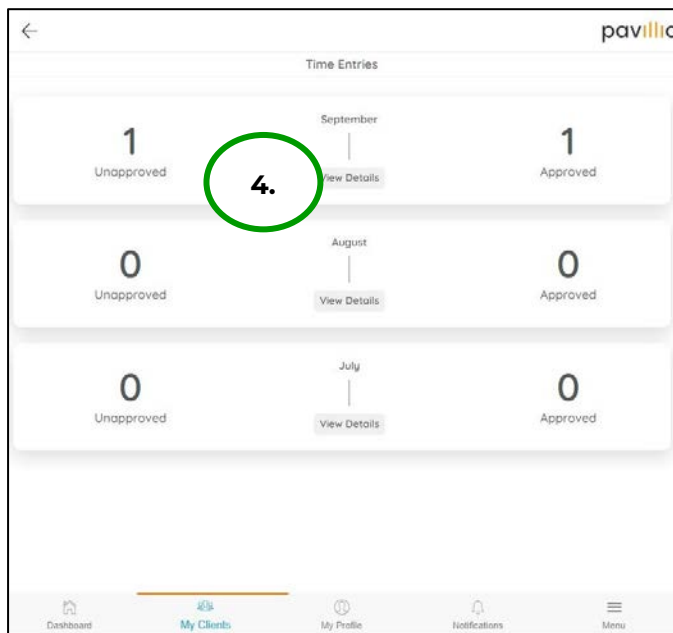
5. Select **Unapproved** to view timecards that have NOT been approved by your Responsible Party.
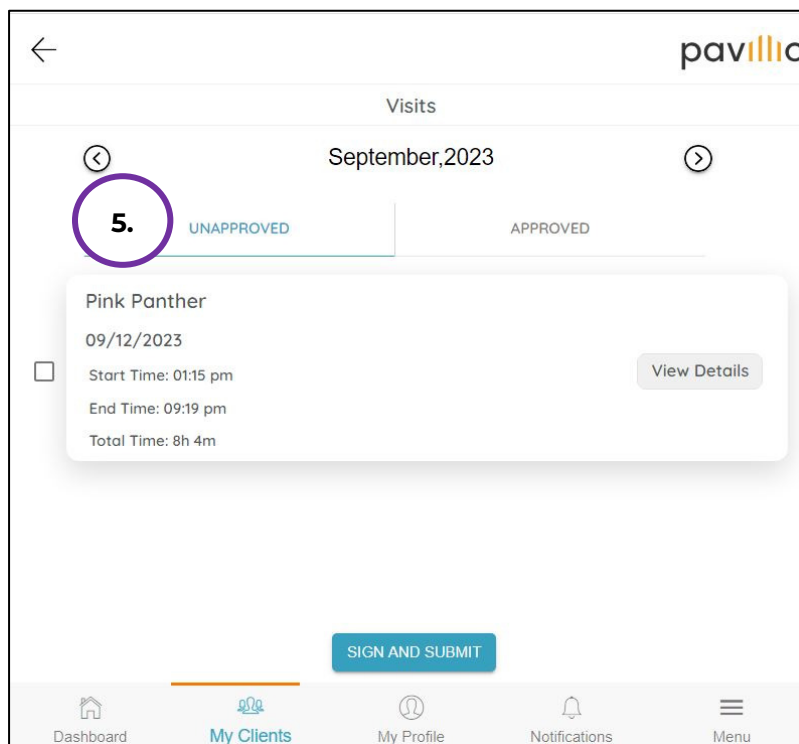
6. Select **Approve** to view timecards that have been approved by your Responsible Party and will be processed for payroll.

7. Select **View Details** for each time entry you would like to review.
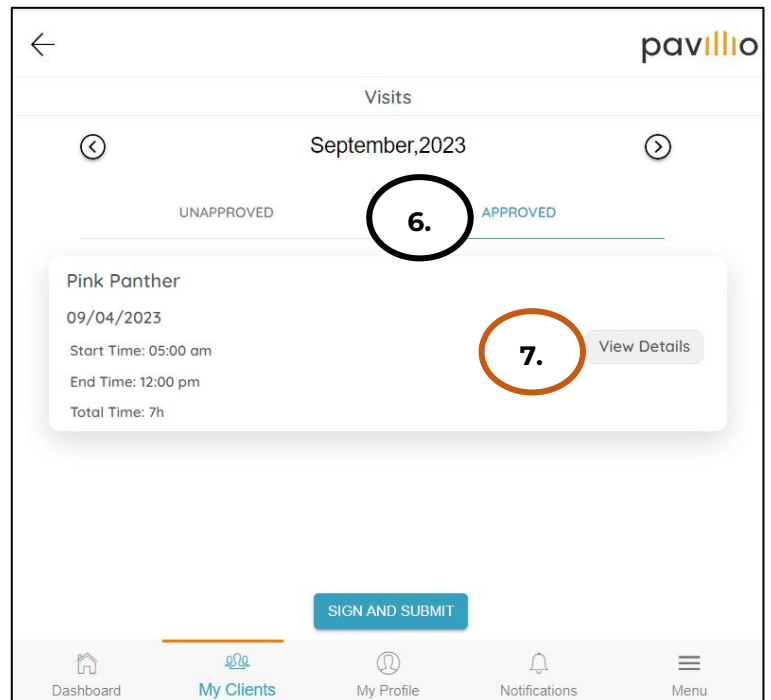
HOW DO I ENTER PAST TIME?

You can refer to **HOW TO ADD TIME AFTER YOUR SHIFT (TEMPORARILY ALLOWED)** to assist with entering past time.

If you have further questions, 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.

RESPONSIBLE PARTY REJECTED MY TIME

Please refer to **HOW TO EDIT REJECTED TIME ENTRIES** for next steps.

If you have additional questions, please submit an email ticket to our technical team at CasheSupport@lifeworks.org.
    Include the following information:
- Screenshot of the time entry details
- 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.

CHECK THE STATUS OF A TIME ENTRY

There are 3 ways to check the status of your time entry:
1. Follow the steps within **HOW TO VIEW APPROVED AND UNAPPROVED TIME ENTRIES** in the Commonly Asked Questions section.
2. Reach out to your Responsible Party.
3. Send an email ticket to the technical team at CasheSupport@lifeworks.org.
    Include the following information:
- Details of the time entry
- 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.

HOW TO SWITCH FROM CAREGIVER TO RESPONSIBLE PARTY

1. Log Out of Pavillio EVV
    a. Select **Menu**
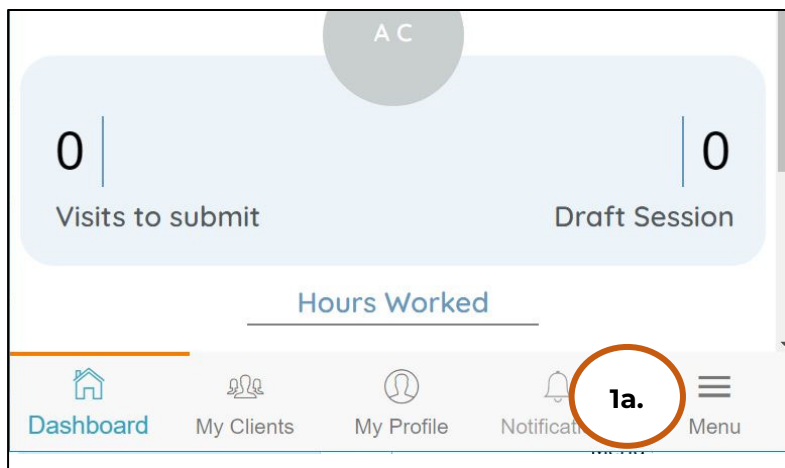
    b. Select **Logout**
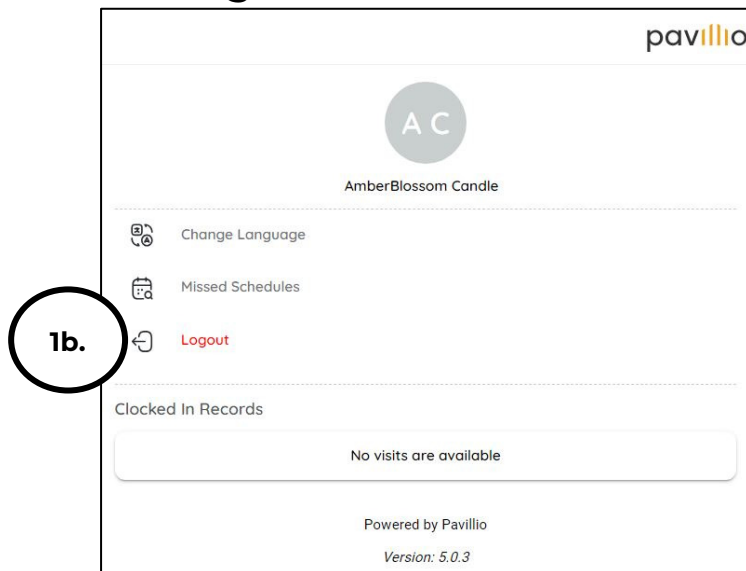
2. Log back in
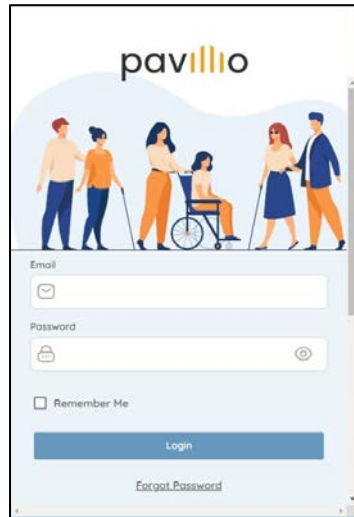
3. Select the Responsible Party role
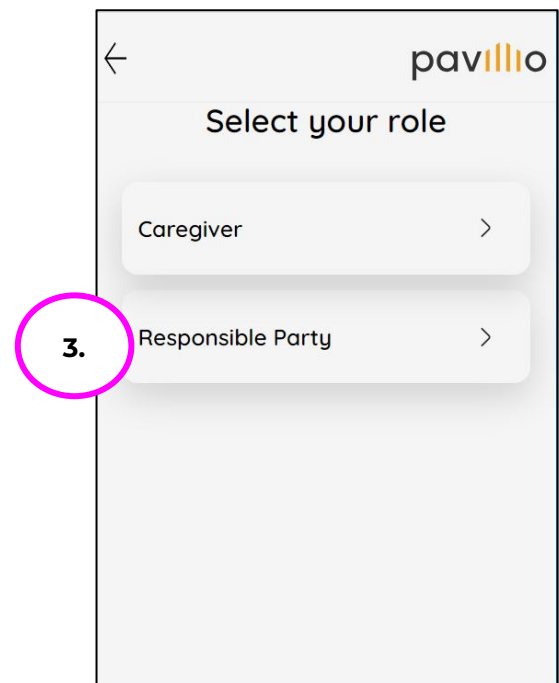
WHY DO I HAVE TO SELECT A ROLE?

This means you are listed as both a Caregiver AND Responsible Party for the Participant. When working with the Participant you will choose the **Caregiver** role to Clock In and Clock Out. When approving timecards for yourself and your Caregivers you will choose the **Responsible Party** role. For assistance with the Responsible Party role reference the Support Manager User Guide for Pavillio EVV located on our website https://www.lifeworks.org/timekeeping/.

IS THE PASSWORD THE SAME FOR THE RESPONSIBLE PARTY ROLE?

Yes, the password is the same for both the Employee AND the Responsible Party role.

If your password is NOT working for either login, 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 best the Date & Time for a returned call.

PARTICIPANT IS NOT LISTED

1. If your participant is not listed, it could mean that some information is missing from your Employee Profile. Please submit an email ticket to our technical team at CasheSupport@lifeworks.org
Include the following information:
   - Screenshot of error the message on the Care Recipients screen showing the participant is missing
   - 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.

WHATS THE BEST PRACTICE FOR ENTERING TIME?

Best practice for recording your time is to clock in at the beginning of your shift and clock out at the end your shift. Once EVV is implemented, it is Lifeworks' understanding that the edit feature will no longer be allowed. For more information about EVV, please refer to **About Pavillio EVV**.

WHEN IS PAYROLL DUE?

Go to our website https://www.lifeworks.org/fiscal-support/forms/ to reference our most recent Payroll Calendar.

HOW DOES MY TIMECARD GET SIGNED?

Once you SIGN AND SUBMIT your timecard, your Responsible Party is notified. Your Responsible Party will then Review, Sign, and Approve your timecard so it can be processed for payroll.

If you are NOT sure, reference **HOW TO VIEW APPROVED AND UNAPPROVED TIME ENTRIES** in the Commonly Asked Questions section.

WHAT ACTIVITY SHOULD BE CHOSEN?

The Pavillio Timekeeping System caters to multiple programs. The activity section is customized to each Participant.

> For example:
> Service = Respite   Activity = Respite
> Service = Home making   Activity = Light Housekeeping
> Service = Personal Support   Activity = Personal Support
> Service = Night Supervision   Activity = Night Supervision

If you are not sure what to select, please connect with your Responsible Party.

If you need further assistance, please submit an email ticket to our technical team at CasheSupport@lifeworks.org.
> Include the following information:
- Screenshot of what Activities are listed
- Your Full Name
- Your Username
- Preferred contact method for the response

DO I NEED THE PAVILLIO EVV APP OPEN ALL DAY?

All you need to do is open Pavillio EVV to Clock In but there is no reason to keep it open.

The next time Pavillio EVV needs to be opened is when you are ready to Clock Out & submit your timecard.

WHY DOES PAVILLIO LOOK DIFFERENT?

Pavillio, from the makers of Cashé Software, released an updated version of their App and website May of 2023; "Pavillio EVV 5.0" which altered the look but not the functionality. More version updates will continue with the intention to continuously improve the software.
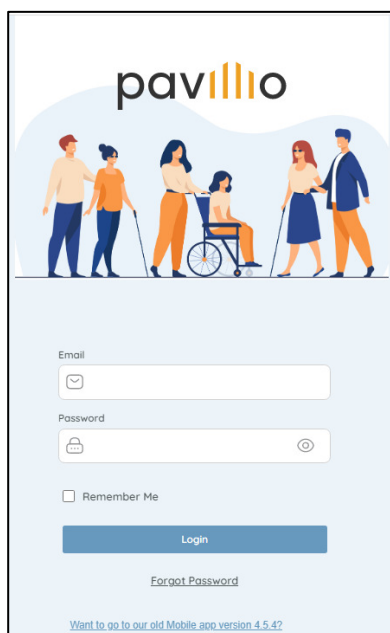
UPDATING YOUR CONTACT INFORMATION

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 Responsible Party (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.