RESPONSIBLE PARTY USER GUIDE FOR PAVILLIO EVV FOR <u>SHARED SERVICES</u>

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

SYSTEM FEATURES

As an online software system, Pavillio EVV allows you to approve timecards as soon as possible, eliminating the need to submit paper copies and complete bi-monthly approvals to ensure available units. Features include:

1. **Responsible Party Personal Identification Number (PIN)**

   As the Responsible Party, you can choose a 4-digit PIN to approve time entries immediately after your employee has completed their shift. Your employee signs their name on their device and then they pass their device to you to sign and enter your PIN. Once completed, no further action is needed to submit time.

2. **Spending Summary (Service Utilization)**

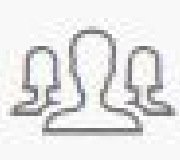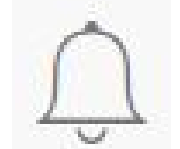   You can view an expense report at a glance and also with line item details.

3. **Timecard History**

   You can view all the time entries submitted for each employee.

GETTING STARTED

SNAPSHOT OF NAVIGATION

	Dashboard (Default View)	
What's Here?	Total Hours for current week Timecards started but NOT submitted to the Responsible Party	

	Care History	
What's Here?	Timecards that NEED to be Approve Timecards you have already Approved	

	My Profile	
What's Here?	Your contact information Lifeworks has on file Navigation to Change Pin Navigation to Reset Pin	

	Notifications	
What's Here?	Notification of an action that occurred.	

	Menu	
What's Here?	Navigation to change the default language Navigation to Switch Client * Only Applicable is you are associated with multiple Participants* 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
Session	Shared Services Shift	Time spent working with more than 1 participant at a time

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
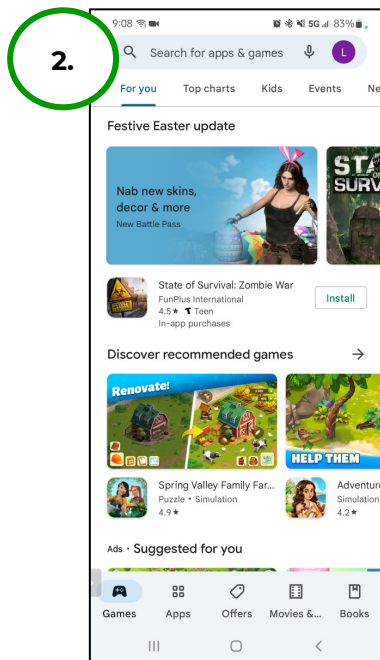 - Google Chrome Version - 88.0.4324 or above

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:
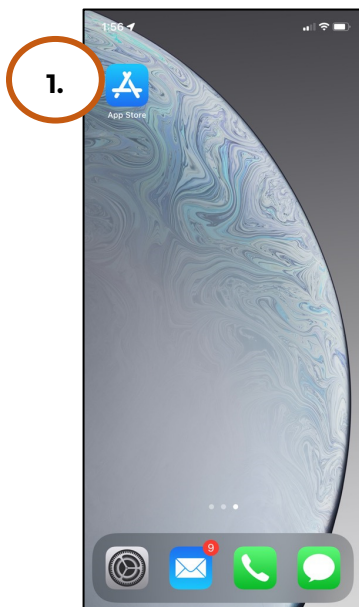   **Pavillio EVV** .

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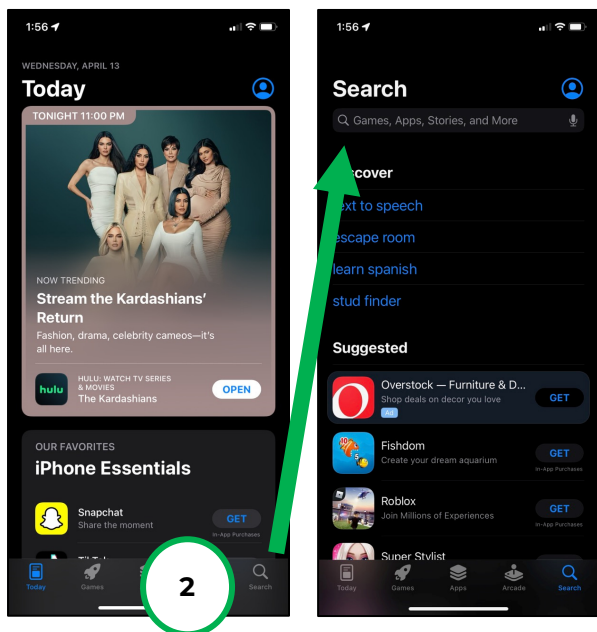
IOS/APPLE APP – IPAD AND IPHONE

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:
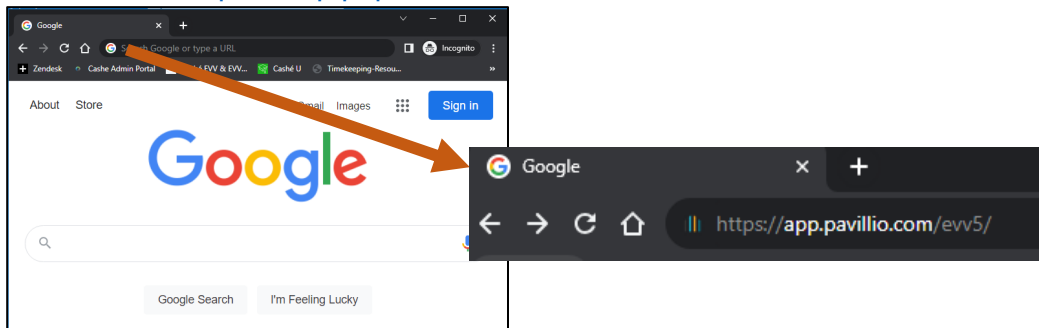   **Pavillio EVV** .

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/
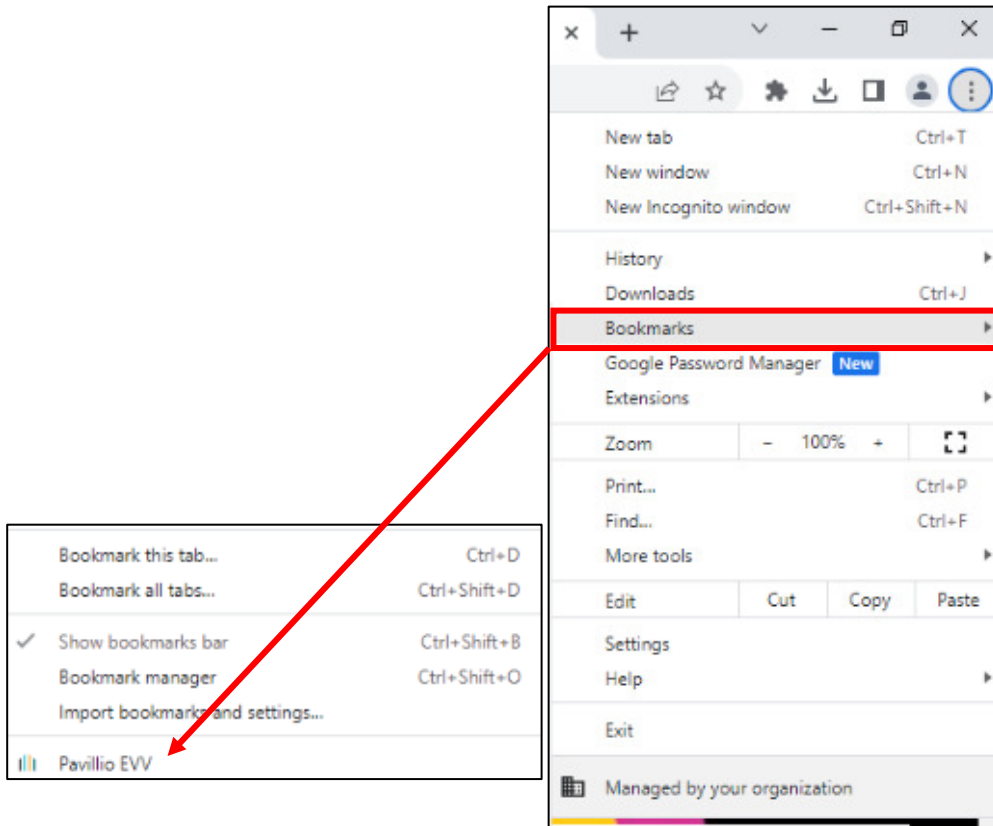

      iii. To the right of the address bar, select the Star ☆

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

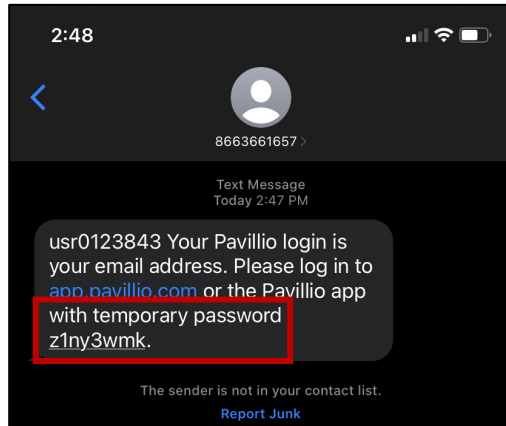app.pavillio.com/evv5/

   iii. Find and select the bookmark

HOW TO LOG IN AND SET UP YOUR PASSWORD
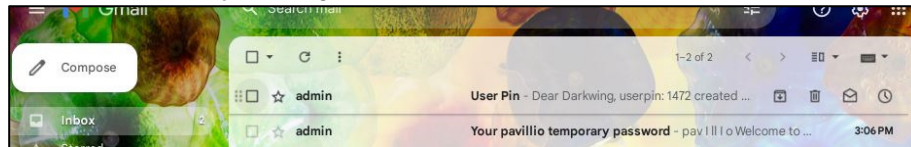
1. You will receive 3 communications from Pavillio:
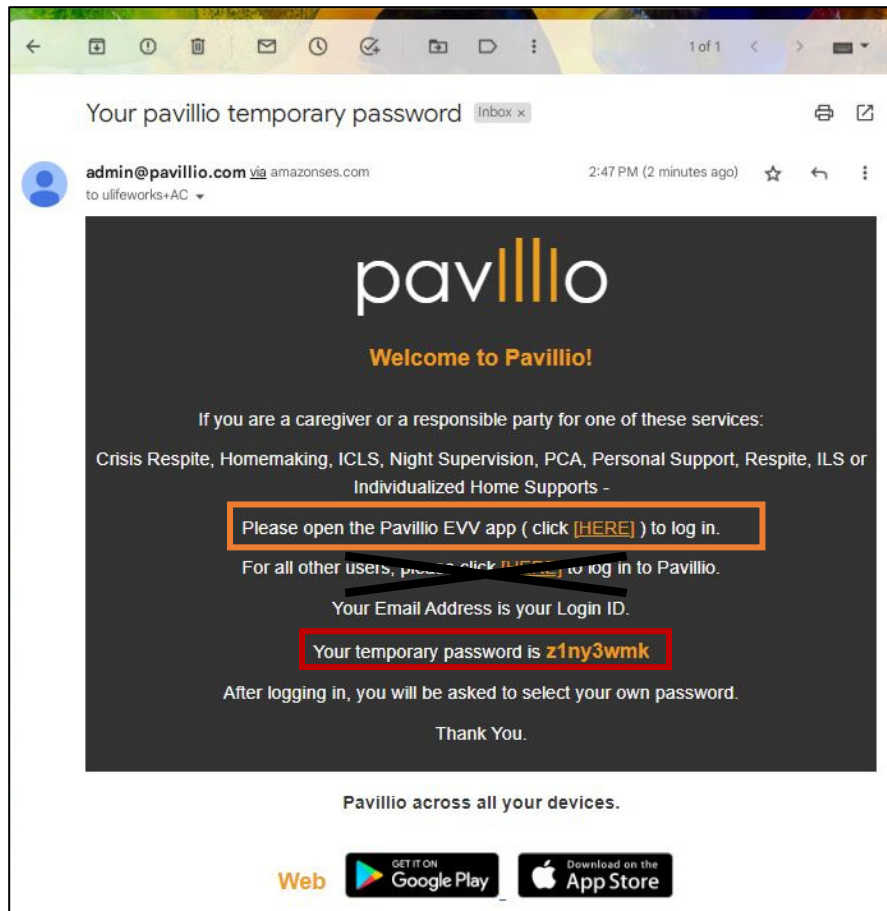   - A text message to your mobile device with a **temporary password**.
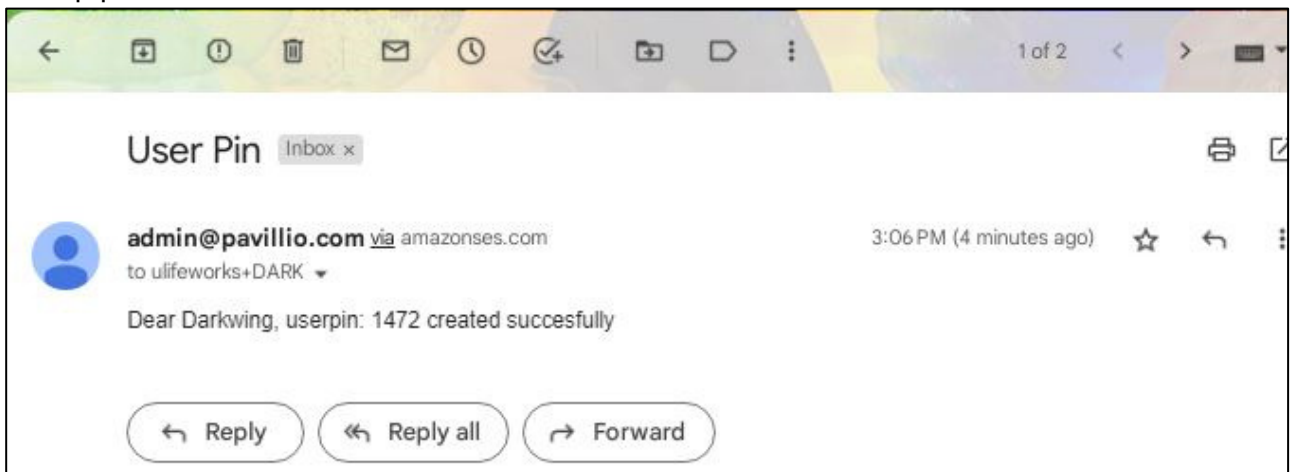

   - An email from **admin@pavillio.com** with the same **temporary password**.

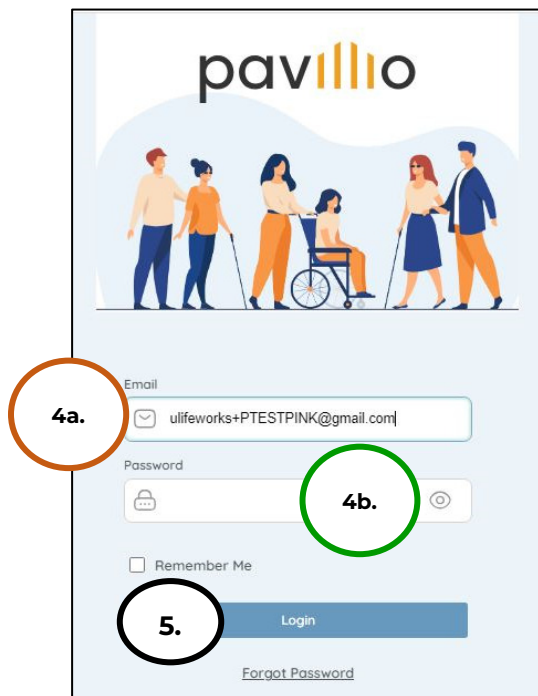   **NOTE:** Temporary Password will be valid for 30 days

- The third communication will be an email from admin@pavillio.com with your 4-digit PIN you will can to approve time entries

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

5. 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

6. Enter the temporary password you were given via email and text message into the **Current Password** box.
7. Enter your chosen password into the **New Password** box and in the **Confirm Password** box
8. Select **Reset**

9. You will be redirected to the main login screen
10. Log in to Pavillio EVV
    a. Enter your email address into the in the **Email** box
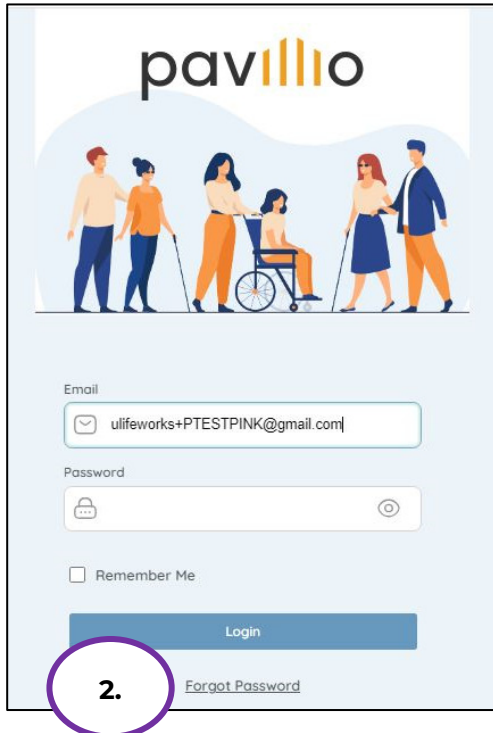   b. Enter your temporary password into the **Password** box.
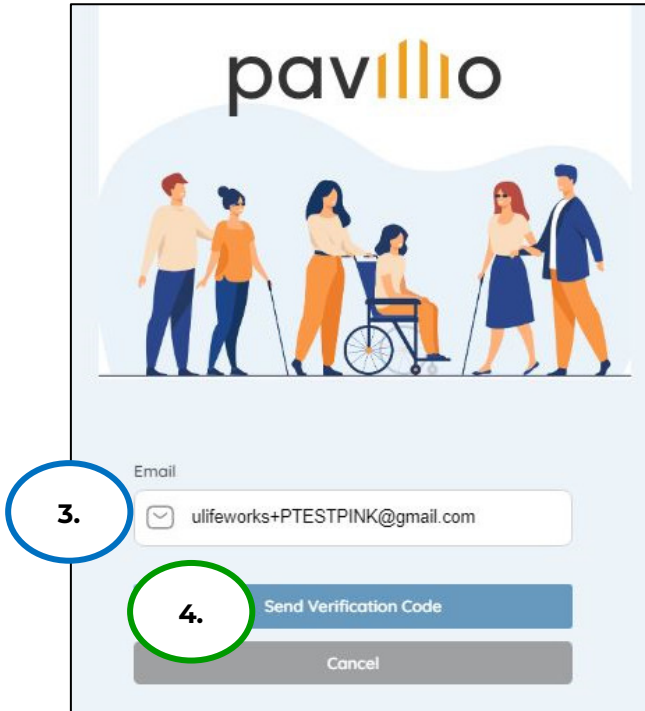11. Select **Login**

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**
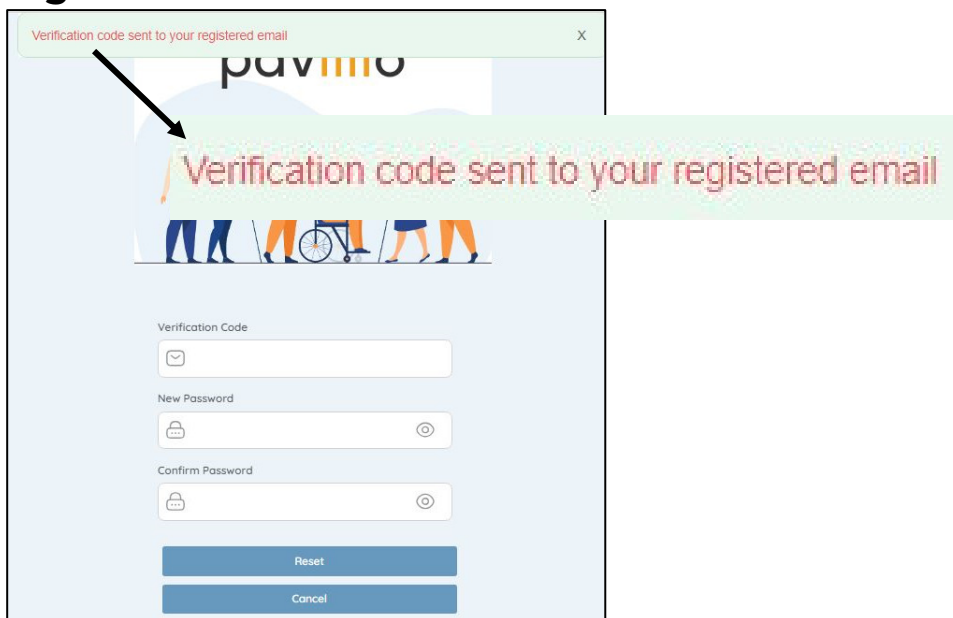
6. Log in to your email and open the message from Pavillio titled **Your pavillio verification code**.
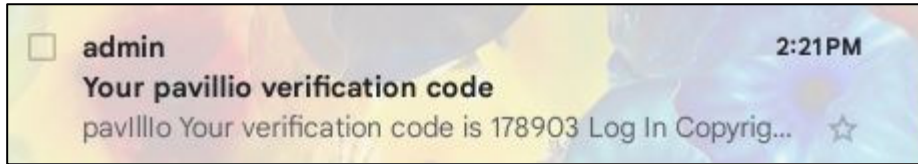
7. Make note of the verification code listed in the email.
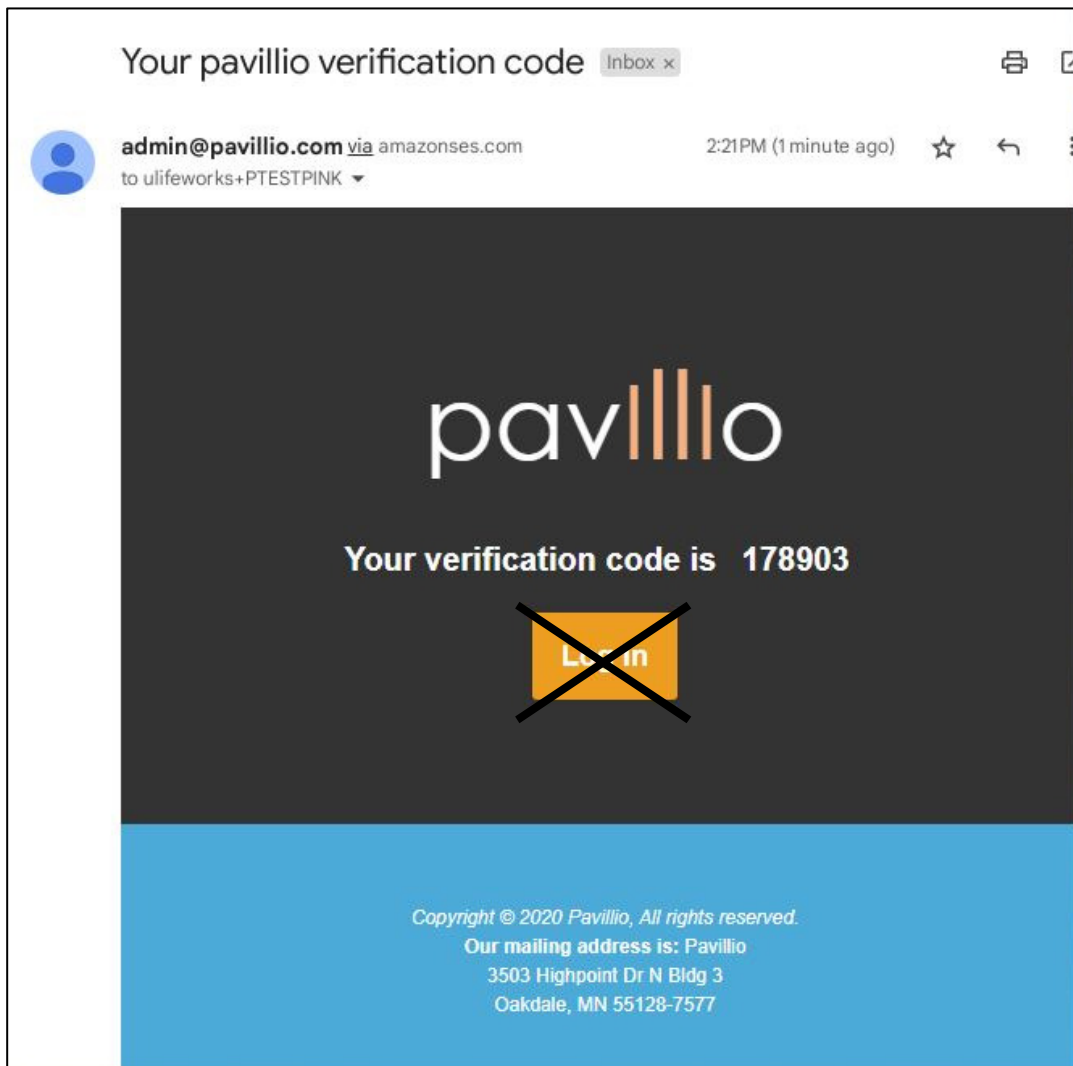
8. <mark>**Do not click on the orange Log In button in the message**</mark>. Instead, to log in, access the Pavillio EVV app on your phone/tablet or go to the EVV website: https://app.pavillio.com/evv5/. For assistance, refer to **How to Access Pavillio EVV**.

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.
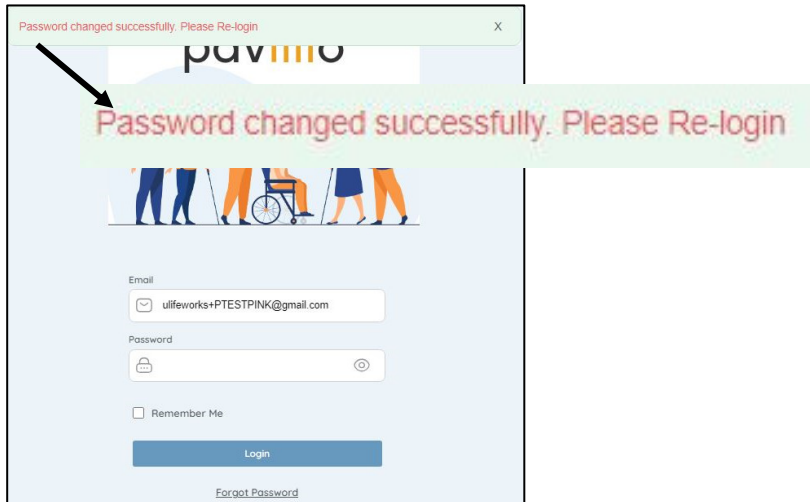
12. Log in to Pavillio EVV
    a. Enter your email address into the in the **Email** box
    b. Enter your temporary password into the **Password** box.

13. Select **Login**
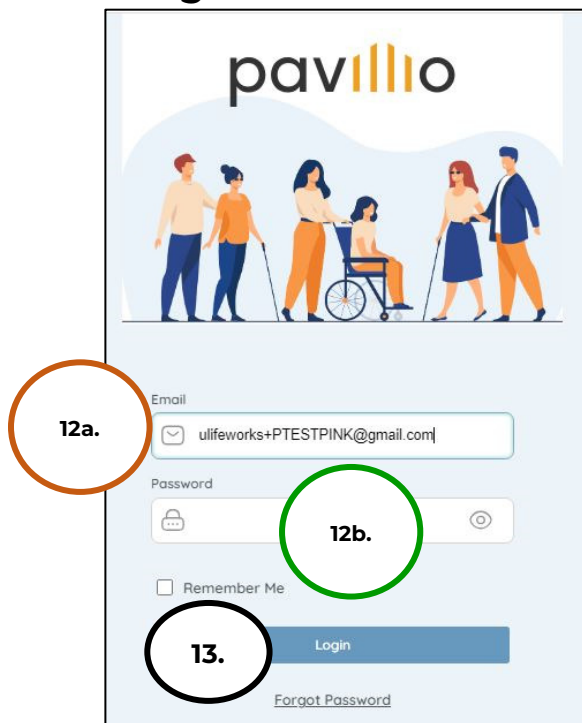
HOW TO USE PAVILLIO EVV

HOW TO REVIEW & APPROVE TIME ENTRIES

1. Select **Visits to approve** on the Dashboard
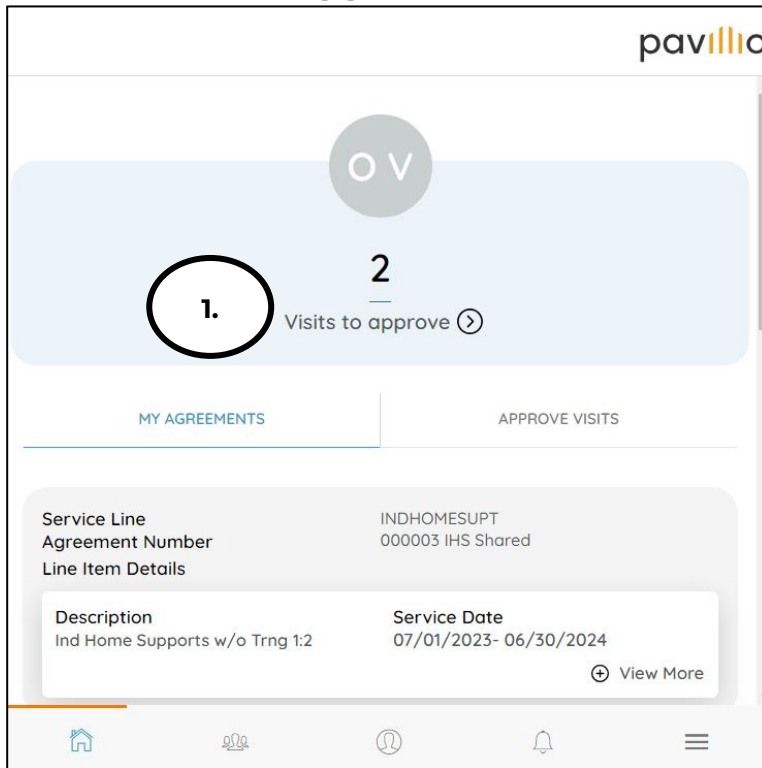
2. Select **View Details** on the timecard for you to review
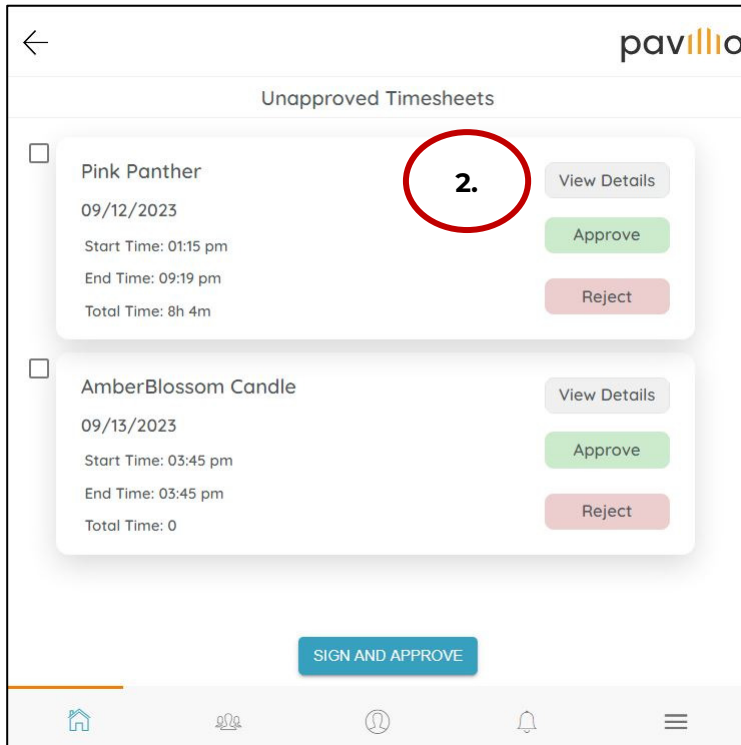
3. Confirm the following are accurate for your Employee's shift:
   a. **Date**
   b. **Start Time**
   c. **End Time**
   d. **Activities**
   e. (If Applicable) **Employee Comments**

Note: You may need to scroll down on your device to locate ALL the details to review.
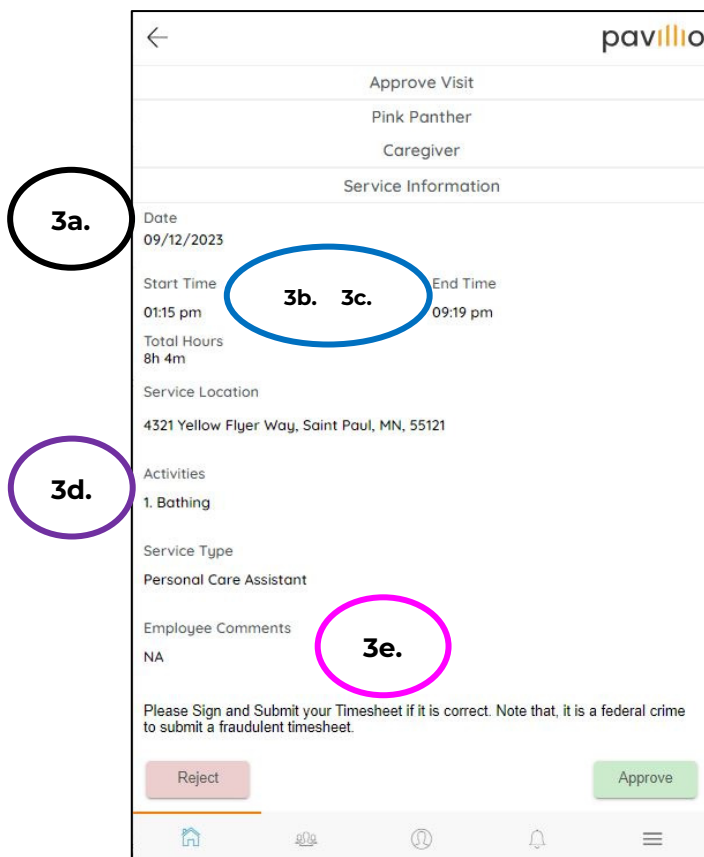
4. To approve the time, continue to <u>Step 5</u>. To Reject the time, continue in the **How to Reject Time Entries** section.

5. If everything is accurate, submit the time entry by selecting
Approve

OPTION 1 – EMPLOYEE TO SIGN AND SUBMIT TO RESPONSIBLE PARTY FOR APPROVAL

This option is only available if your Employee signs and submits their time at the end of their shift for you to approve.

1. You will 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

2. Select **Approve**
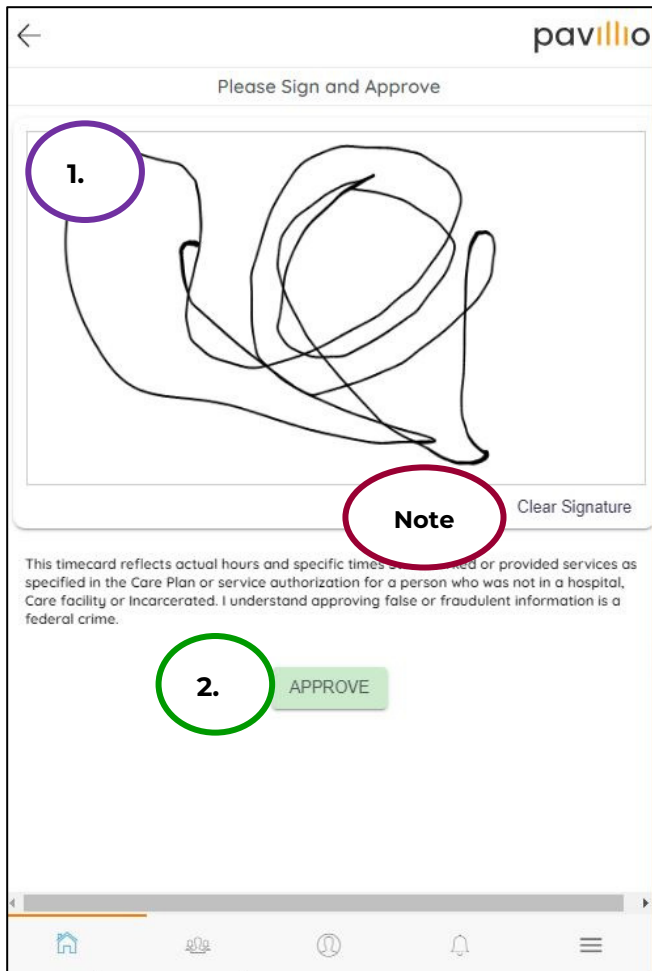
3. You will see a **Timesheet has been Approved successfully** message to confirm it has been submitted for Payroll.
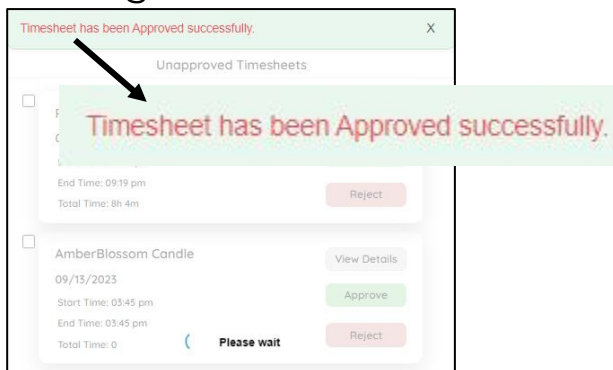
OPTION 2 – SIGN, SUBMIT, <u>AND</u> RESPONSIBLE PARTY APPROVES

This option is only available if both you and your Employee are available at the end of your Employee's shift. These steps are done on their device *before* they submit their time.

1. Select the **Responsible Party** box; it will turn blue once selected
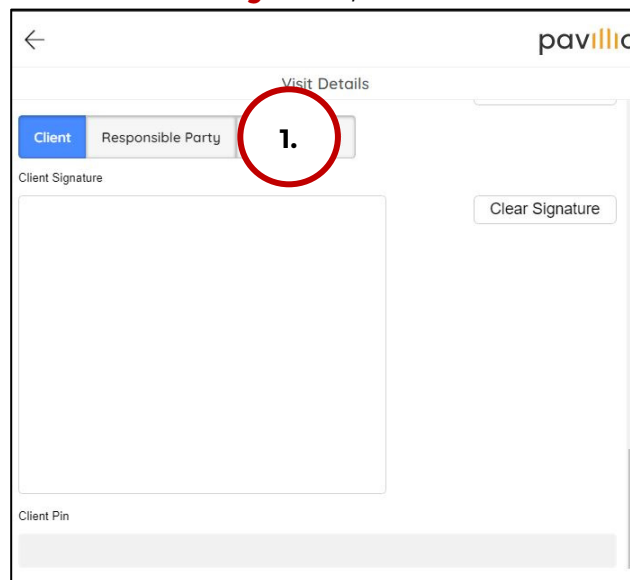
2. *(If applicable)* Select the Responsible Party's name from the **drop-down menu**
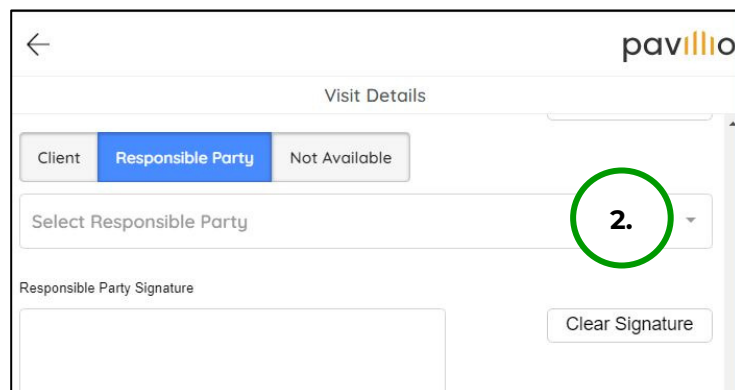
3. Select the name of the **Responsible Party** that is present
4. Select **OK**
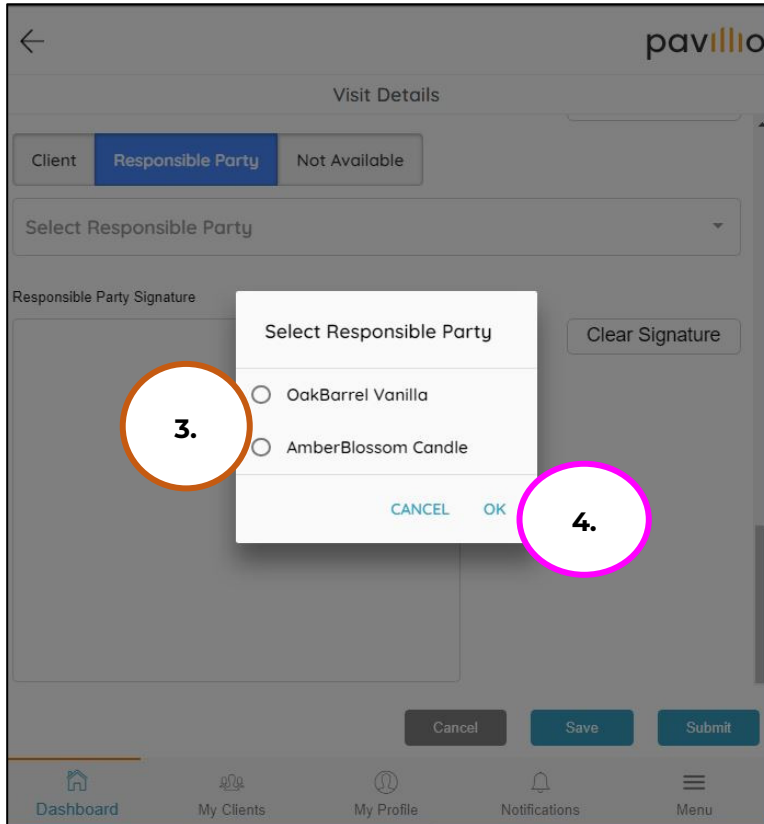
5. Your Employee will hand their device to the you

LifeWORKS

A nonprofit serving
people with disabilities

6. You will use their touch screen or their 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

7. You will enter your **4-digit PIN**
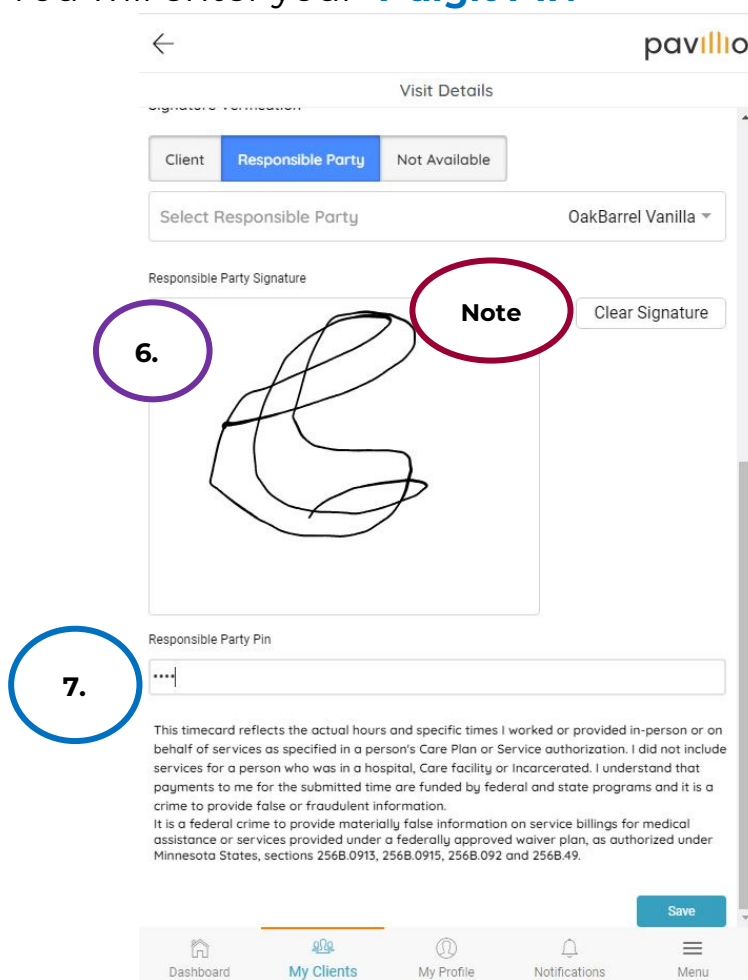
8. Your Employee will select **Save**

This timecard reflects the actual hours and specific times I worked or provided in-person or on behalf of services as specified in a person's Care Plan or Service authorization. I did not include services for a person who was in a hospital, Care facility or Incarcerated. I understand that payments to me for the submitted time are funded by federal and state programs and it is a crime to provide false or fraudulent information.
It is a federal crime to provide materially false information on service billings for medical assistance or services provided under a federally approved waiver plan, as authorized under Minnesota States, sections 256B.0913, 256B.0915, 256B.092 and 256B.49.

8. Save

Dashboard   My Clients   My Profile   Notifications   Menu

9. They will see a **Timesheet has been Updated successfully** message to confirm it has been updated.

Timesheet has been Updated successfully.   X

Session Summary

Add Client

Timesheet has been Updated successfully.

Larry Bunny Bird

L B   Personal Care Assistant
Start Time
03:36 pm   Clocked out

End Time
03:39 pm   Add Service Details

Other Expenses   Add Expense

Employee Signature

Dashboard   My Clients   My Profile   Notifications   Menu

10. Repeat Steps 6-9 for each shift the Employee worked

HOW TO REJECT TIME ENTRIES

1. If you are choosing to not approve the Employee's time entries, select **Reject**.
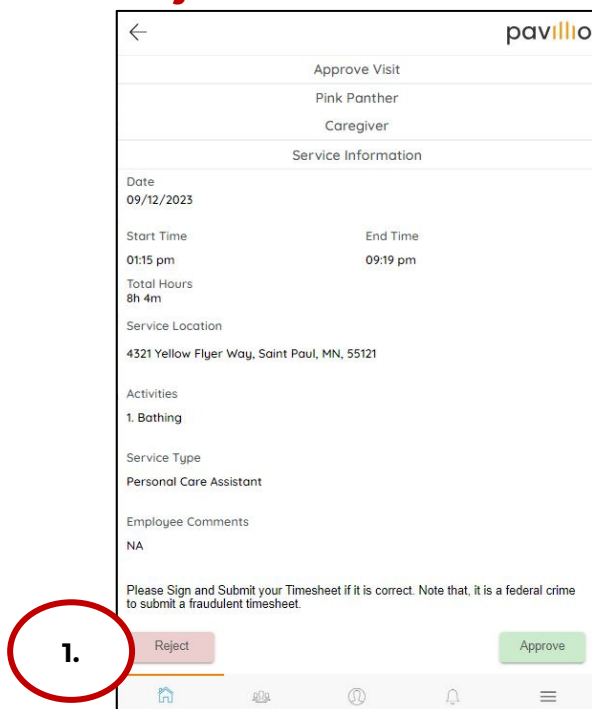
2. Enter your reason in the **Add Comments** box detailing why the visit is rejected.

3. Select **Reject**

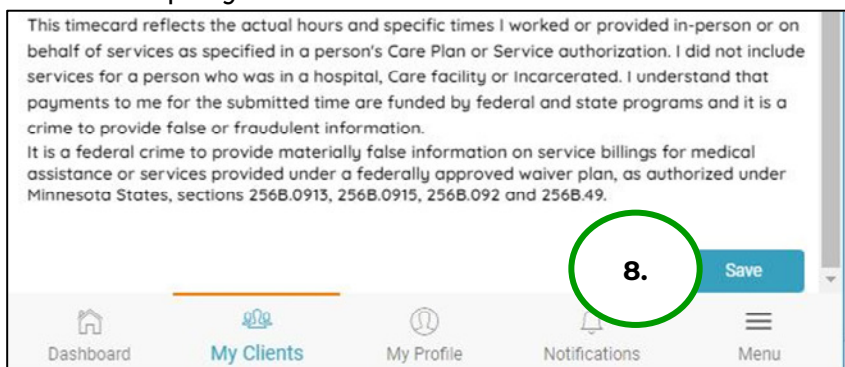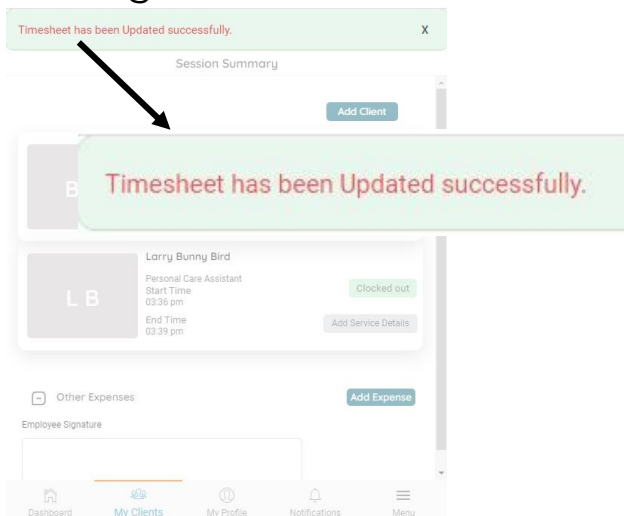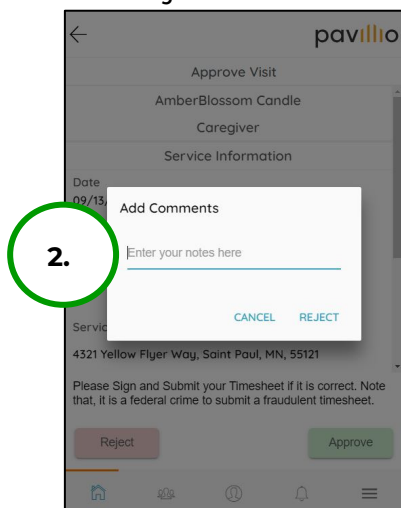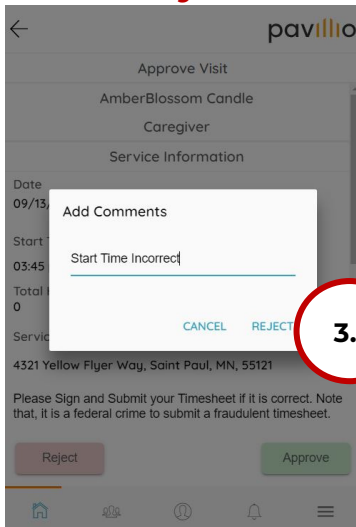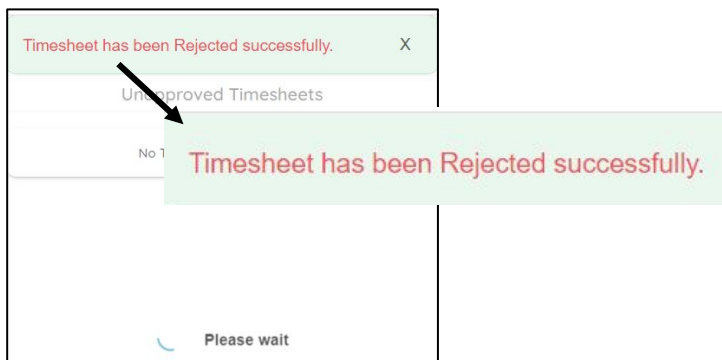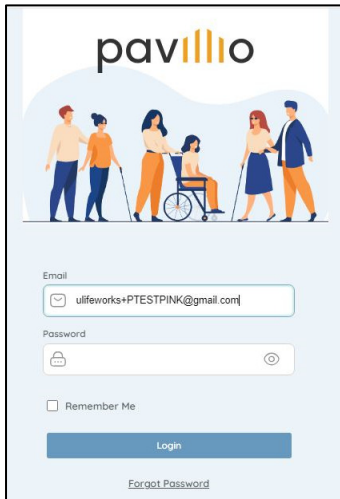4. You will see a **Timesheet has been Rejected successfully** message to confirm it has been sent back to the Employee to correct.
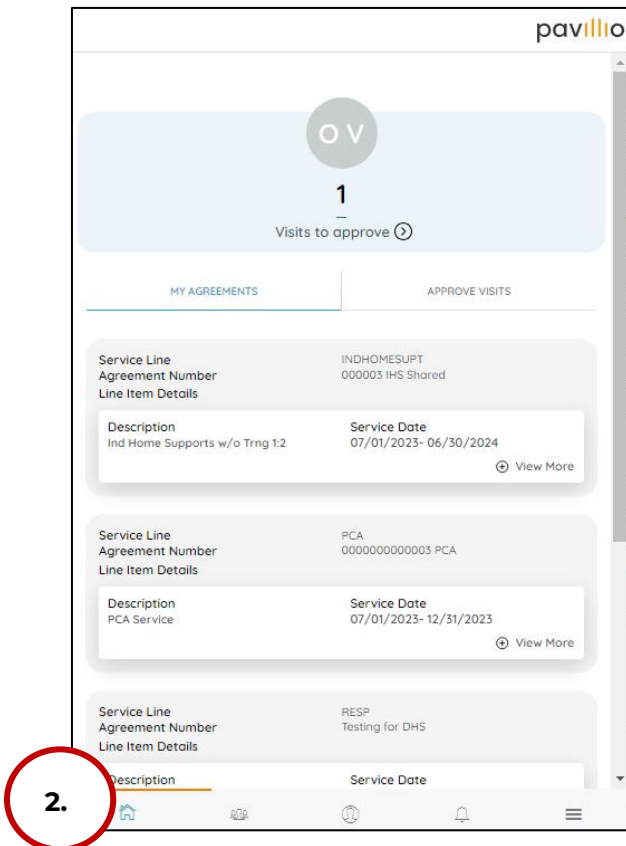
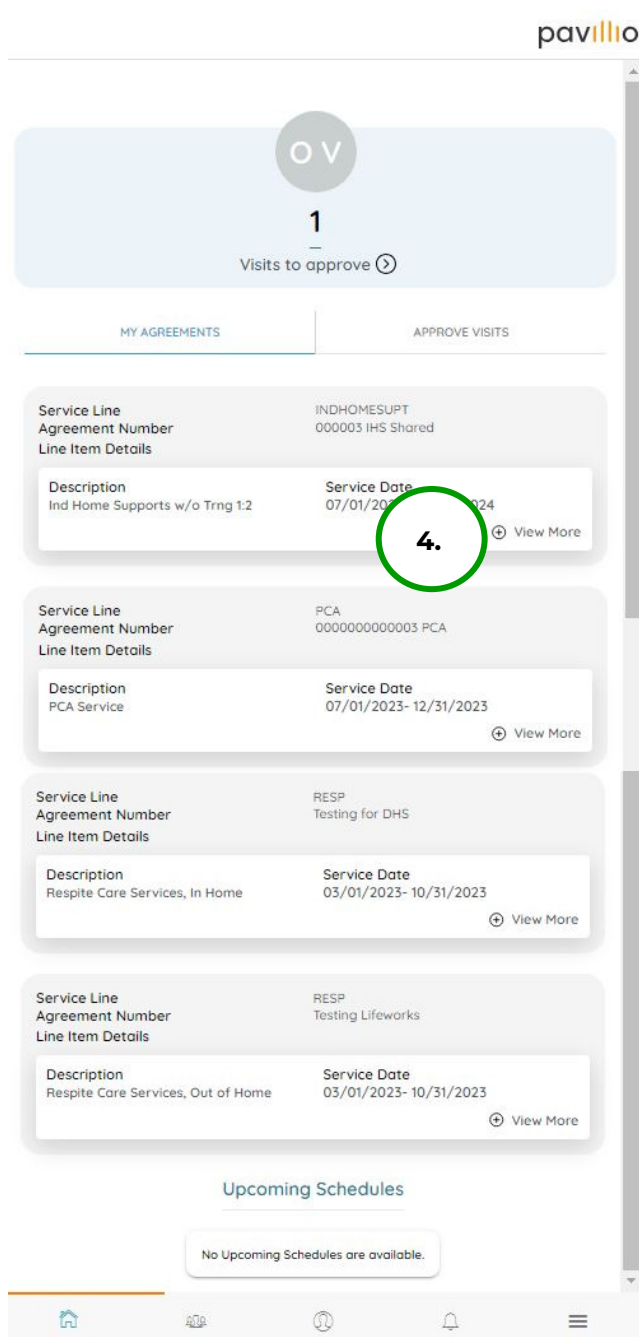# HOW TO ACCESS THE SERVICE UTILIZATION

1. Log in to Pavillio EVV

2. Select **Dashboard**, the 1st button from the left
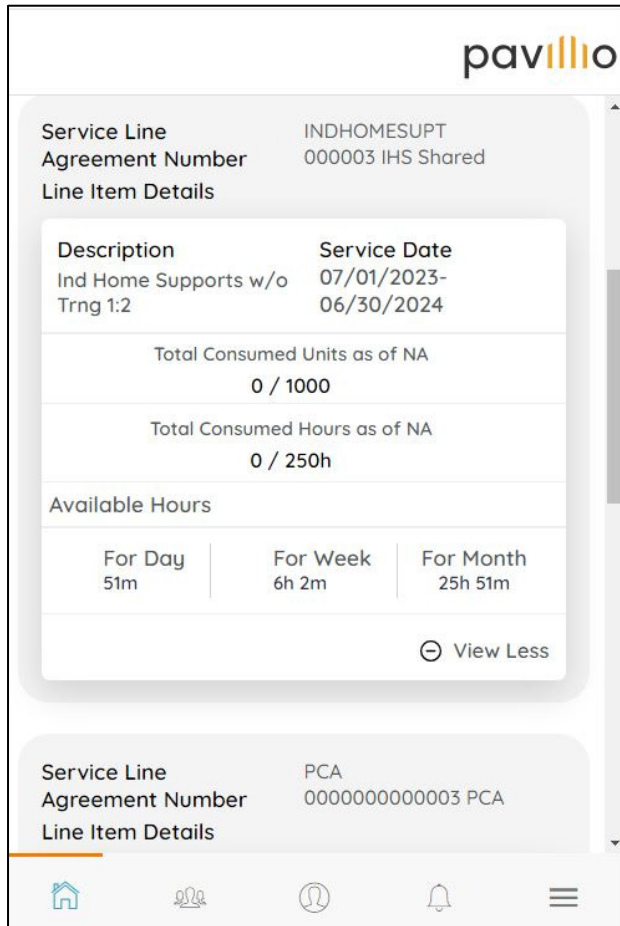
3. Review all lines within the budget
4. Select the **plus (+)** to View More details

5. Once the **plus (+)** has been selected, you can see the following

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.
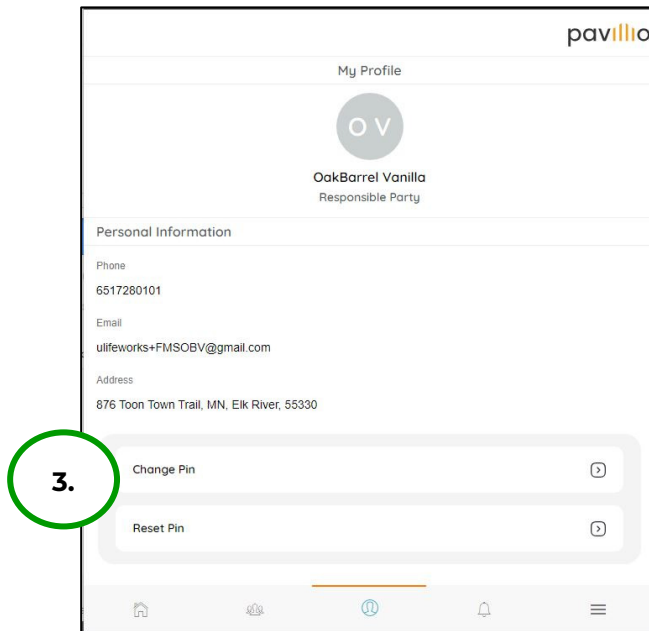
HOW TO CHANGE YOUR PIN

1. Do you have the PIN from Pavillio that was emailed to you?
    a. If Yes, move to Step 2.
    b. If No, reference **COMMONLY ASKED QUESTIONS** > **HOW TO RESET YOUR PIN**
2. Select **My Profile**, the 3rd button located at the bottom of the dashboard.
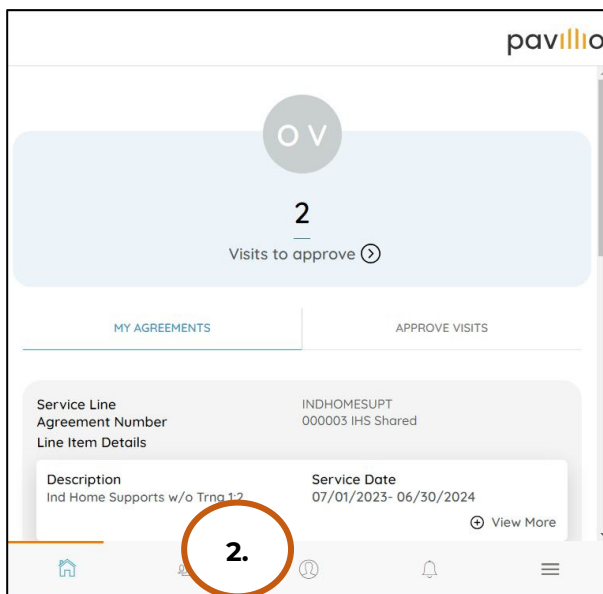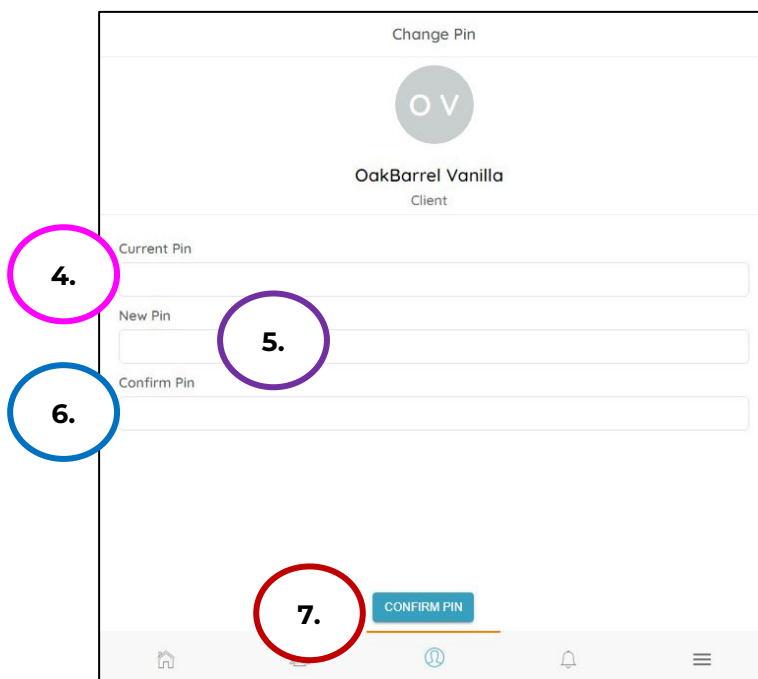
3. Select **Change Pin**

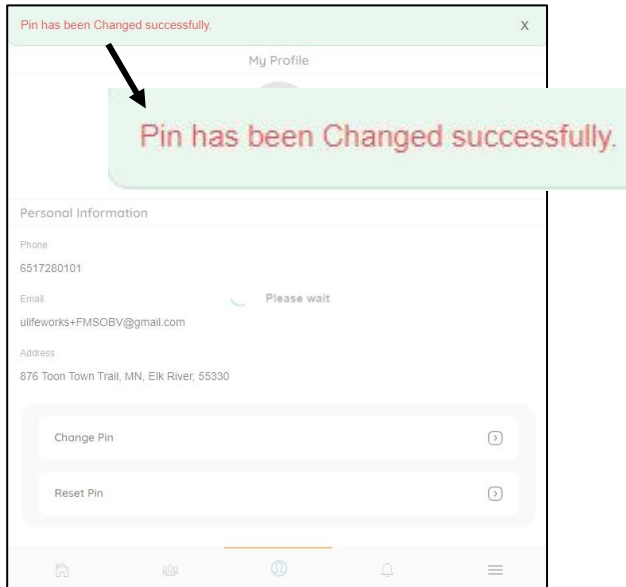

4. Enter the Pin from the email in **Current Pin** box
5. Enter your new 4-digit Pin in the **New Pin** box
6. Re-enter your new Pin in the **Confirm Pin** box
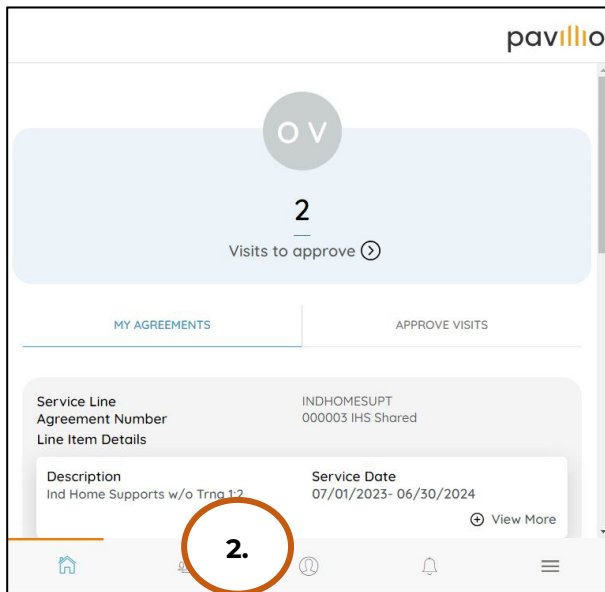7. Select **Confirm PIN**

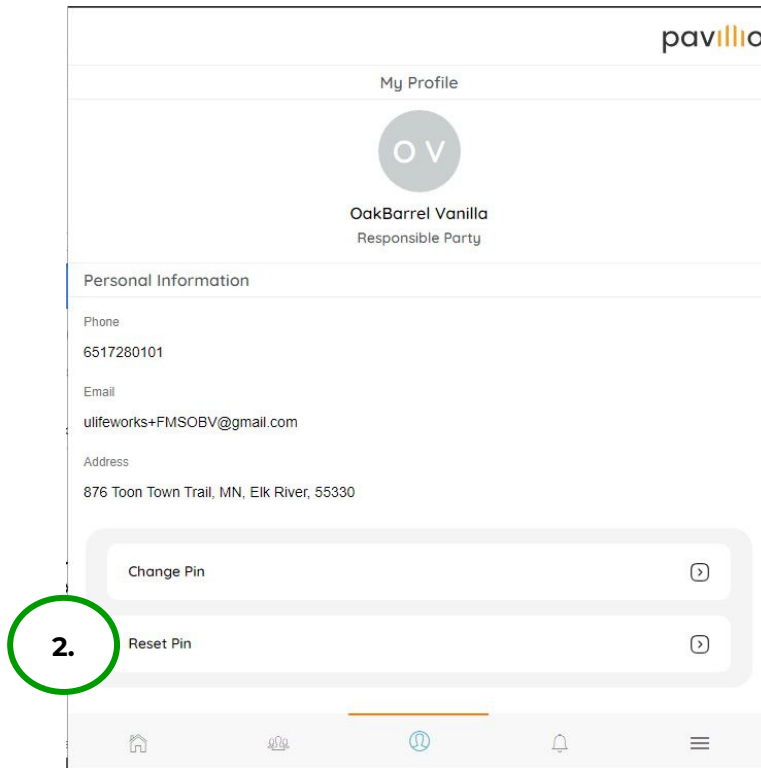8. The message **Pin has been Changed successfully** will appear
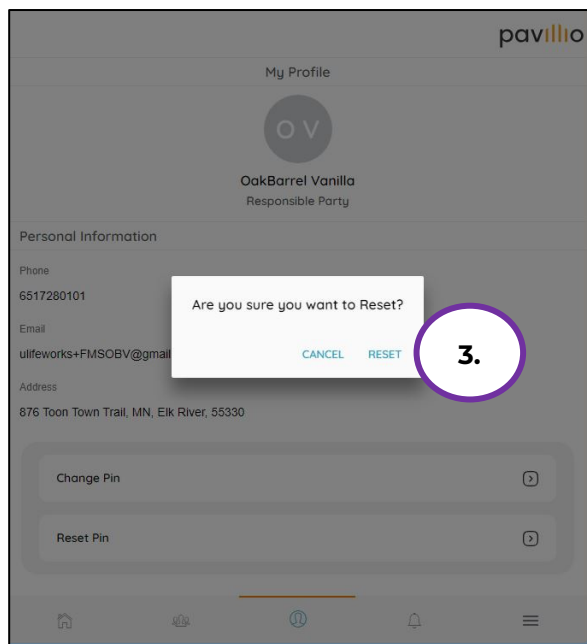

HOW TO RESET YOUR PIN

1. Select **My Profile**, the 3rd button located at the bottom of the dashboard.

2. Select **Reset Pin**
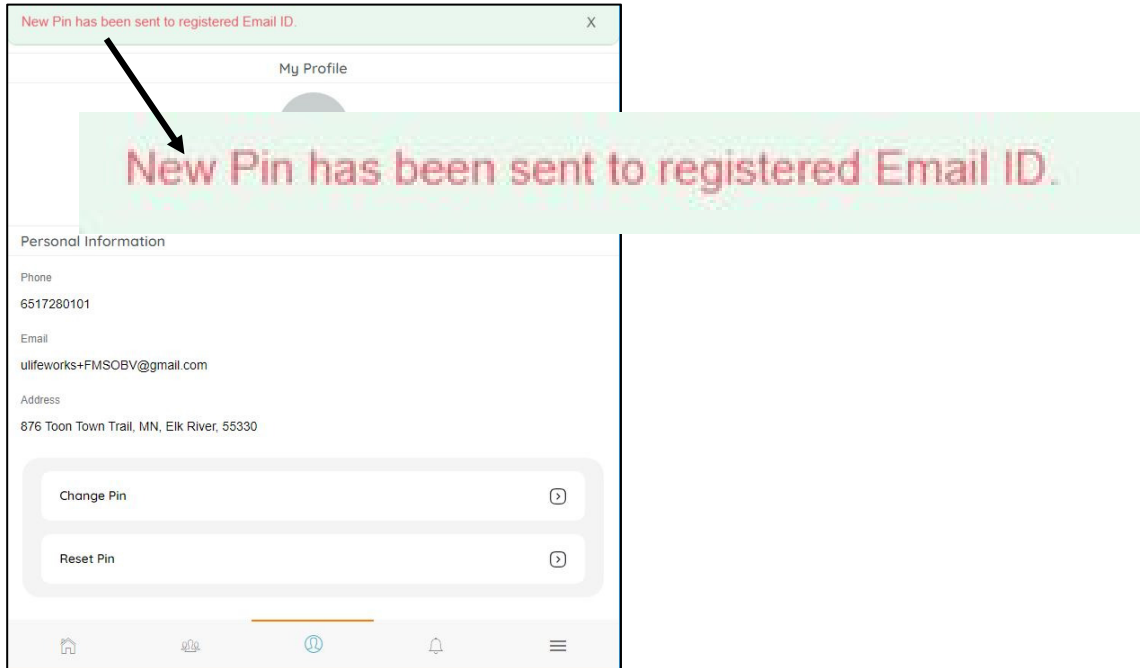

3. Select **Reset** when asked **Are you sure you want to Reset?**

4. A message **New Pin has been sent to registered Email ID** will prompt you to check your email

5. Check your **email**; be sure to search your junk/spam, Promotions tab (Gmail accounts) AND Inbox folders for the information.
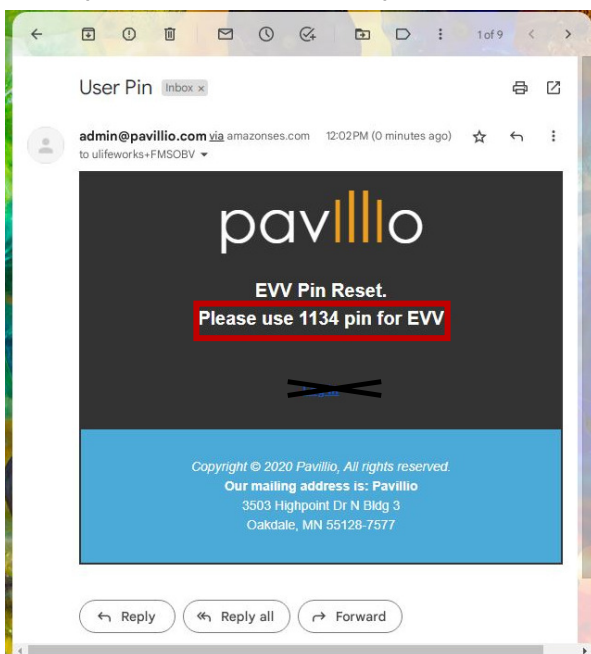
HOW TO CHANGE YOUR PREFERRED LANGUAGE

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.

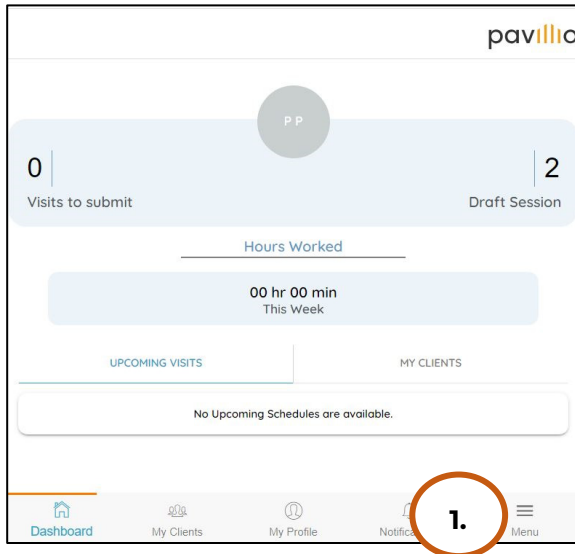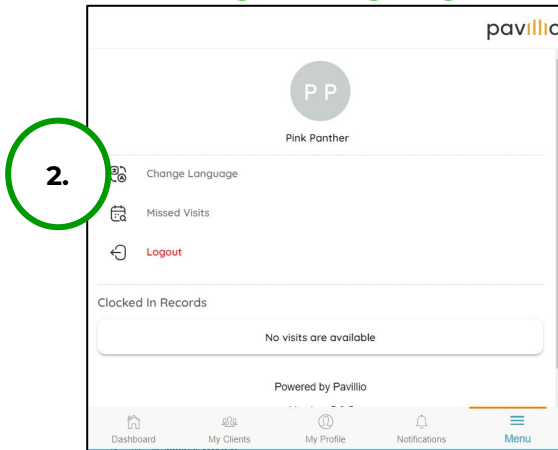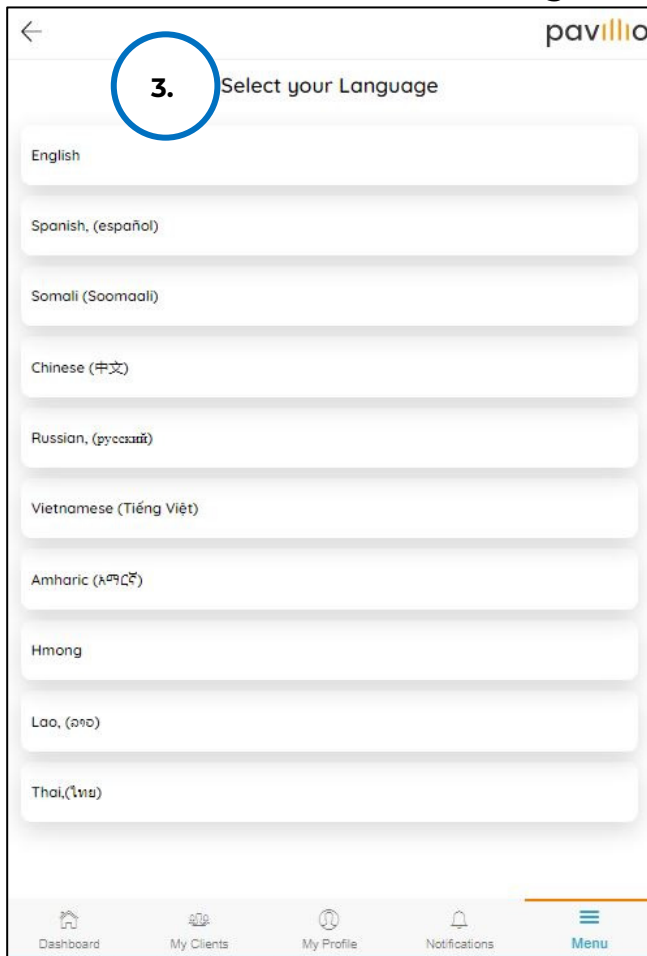4. There will be a message **Your Language has been Updated successfully**
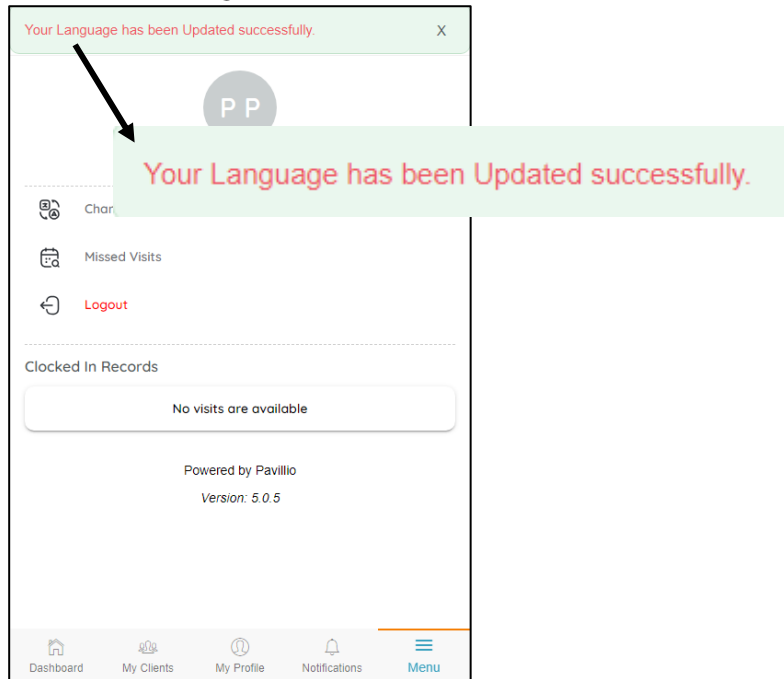
NOTE: You may need to refresh for the language to updated.

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
  - o If a phone call is preferred, please specify the best Date & Time for a returned call.
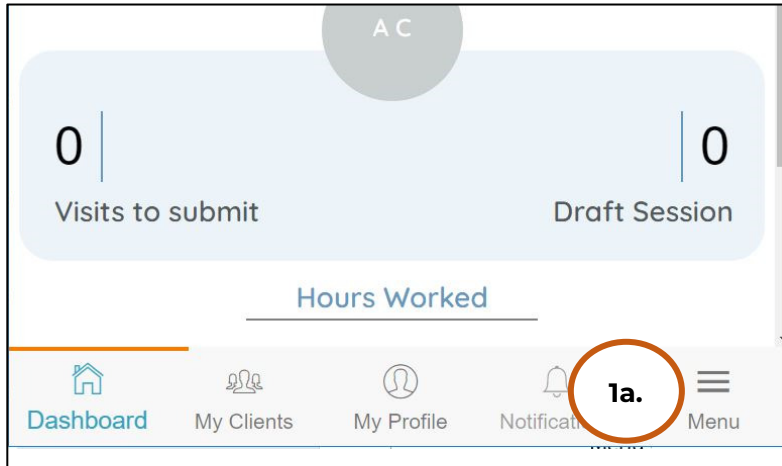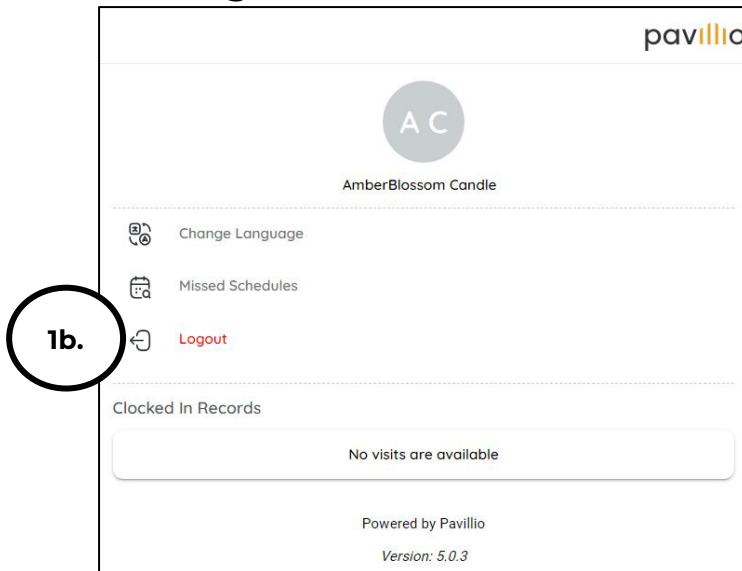
HOW TO SWITCH FROM CAREGIVER TO RESPONSIBLE PARTY

1. Log Out of Pavillio EVV
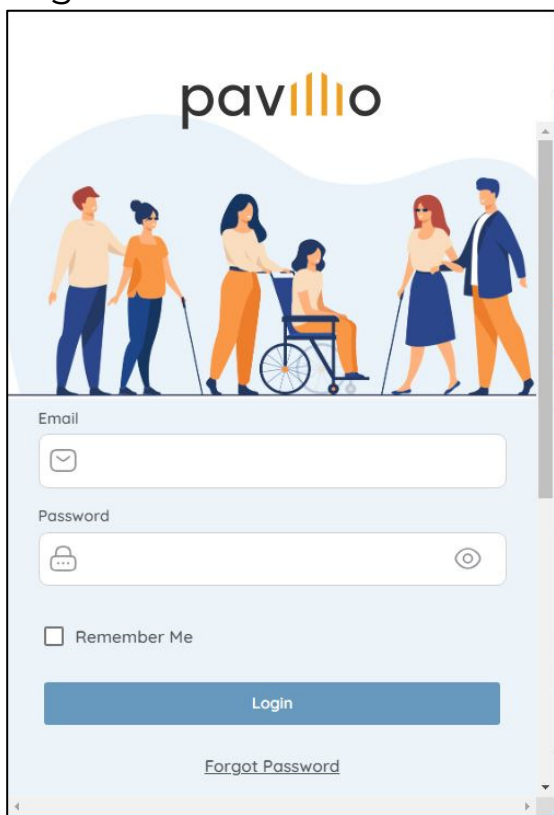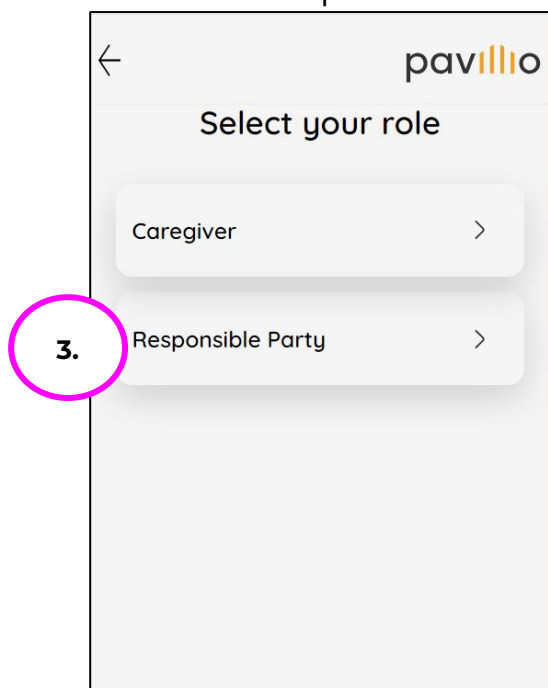   a. Select **Menu**

   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 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.

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 EMPLOYEE'S TIMECARD GET SIGNED?

Once your employee has signed and submitted their timecard, you are notified. You will then Review, Sign, and Approve their timecard so it can processed for payroll.

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
    o If a phone call is preferred, please specify the best Date & Time for a returned call.