NEW JERSEY HUMAN SERVICES

Division of Developmental Disabilities

Understanding Electronic Visit Verification (EVV) and Service Documentation

Guidance for Individuals, Employers, and Self-Directed Employees Enrolled/Enrolling in Acumen

Electronic Visit Verification (EVV)

- EVV is a federal mandate, under Section 12006(a) of the federal 21st Century Cures Act, that requires electronic verification of home and community-based service visits.
- EVV systems collect six data elements for each service visit:
  - Type of service performed
  - Individual receiving the service
  - Date of service
  - Location where service was delivered
  - Individual providing the service
  - Service start time and service end time

Electronic Visit Verification (EVV)

- For DDD-funded services, EVV has already been implemented for in-home services delivered by
  - Provider agency-employed Direct Support Professionals
  - Self-Directed Employees in the Agency with Choice Self-Directed Services Model
- DHS/DDD decided to delay EVV for participants in the Vendor Fiscal/Employer Agent (VF/EA) Self-Directed Services Model until after the new Financial Management Services ("fiscal intermediary") contract award was finalized.

EVV in the Vendor Fiscal/Employer Agent Self-Directed Services Model

- Employers of Record (those holding the EIN – Employer Identification Number) and Self-Directed Employees enrolled or enrolling in the DDD VF/EA Self-Directed Services Model with Acumen as the fiscal intermediary are required to use Electronic Visit Verification (EVV) when any of the following services is delivered partially or completely in the primary residence of the served individual:
    - Community-Based Supports (Supports Program)
    - Individual Supports, 15-minute unit (Community Care Program)
    - Respite (Supports Program or Community Care Program)

Exemptions

Congregate Setting
A setting with 24hr support and includes GH, SA and SL.
Live-in Caregiver
120hr or more
EVV
Exemptions
Community
Anytime a visit does not take place within the individual's primary residence.
Virtual Visit
Teams, Zoom, etc.

Eligibility for Live-In Exemption from EVV

- Some SDEs may be eligible for a live-in exemption from EVV. Eligibility is based on the SDE living in the same residence as the individual served – *eligibility is not based on the employee's relationship to the individual served or the employer*.
- To be eligible for the live-in exemption from EVV, the SDE must meet and be able to document (initially, and annually thereafter) one of the following criteria:
  - **Live-In Permanently:** employee permanently resides on the same premises as the individual to whom services are provided by living, working, and sleeping on the premises seven days per week; and the employee has no home of their own.
  - **Live-In for Extended Periods of Time:** employee resides on the same premises as the individual to whom services are provided for an extended period by living, working, and sleeping on premises for at least five days (120 hours) per week.

Eligibility for Live-In Exemption from EVV

- To apply for the live-in exemption from EVV, the SDE must provide the following to the individual's Support Coordinator – initially (at time of hire), annually thereafter, and any time there is a change in the SDE's live-in status:
  - **Documentation of live-in status** (current proof of residence)
  - **EVV Live-In Caregiver Attestation** completed and signed by the SDE and individual (or their guardian)
- Support Coordinator will upload the attestation in iRecord and identify the SDE as "EVV Exempt"

EVV Example 1: In-Home Visit

Question

- Christina receives two hours of Community Based Supports inside of her home daily. Her Self-Directed Employee (SDE) does not live with Christina. **Does this in-home visit require EVV?**

Answer

- Yes. Because the service is delivered entirely inside the primary residence of the individual served, **EVV is required for the entire service**.

EVV Example 2: Community Visit

Question

- Sam walks to a local park every Saturday to spend two hours with the SDE that provides Individual Supports for him. **Does this community visit require EVV?**

Answer

- No. Because the service is delivered entirely in the community, **EVV is not required for this community-based service**.

EVV Example 3: Partial In-Home Visit

Question

- Daniel’s SDE meets with him in his primary residence for 15 minutes to teach him various tasks. Then, they go to a local park for two hours. **Does this partial in-home visit require EVV?**

Answer

- Yes. When any part of a visit takes place in the primary residence of the individual served, **EVV is required for the entire service**.

EVV Example 4: Live-In SDE

Question

- Victor owns his own home and has a roommate, Michael. Michael also acts as Victor's SDE for two hours every weeknight to help Victor in the home. **Does this service, delivered by a live-in SDE, require EVV?**

Answer

- No. Because the SDE, Michael lives in the same residence as the individual served, **EVV is not required for the service**.

Service Documentation for Self-Directed Employees

Quality Service Documentation → Individualized Supports → Better Quality of Life for the Person Served

Service Documentation Purpose

- Provides a picture of the person and their life
- Monitors progress towards person's goals and needs
- Documents supports provided in relationship to the outcomes and services identified in the person-centered plan
- Maintains communication between all staff
- Keeps service planning team informed, updated, and organized
- Provides evidence of service delivery and a receipt of payment for services provided
- Assists with future service planning decisions for the person
- Minimizes potential risks

Service Documentation Requirements

- At minimum, service documentation **must include**:
  - Full legal name of both employee and person receiving services
  - Service being delivered
  - Date of service and start and end times
  - Number of units of services delivered
  - Description of service provided – ***with appropriate strategies identified***
- Service documentation needs to:
  - Align with the person's plan outcomes and strategies
  - Reflect a sequential outline and progress toward person's service plan goals
  - Be completed by the Self-Directed Employee providing the service

Service Documentation Best Practices

- Be **timely** – complete documentation before the end of each shift.
- Be **objective** – do not be influenced by your feelings and opinions in considering and representing facts.
- Be **thorough** and **accurate** – include all relevant information and make sure date, time, and identifying information is correct.
- Be **familiar** with the individual's person-centered plan.

Using Person-Centered Language in Service Documentation

Person-centered language is a way of speaking and writing that:

- puts the person first
- focuses on the person, rather than their special needs
- supports dignity, inclusivity, and respect for the person
- helps to reduce stigma

Words Matter

Instead of	Use
Non-verbal	Communicates without words
High-functioning	Has great skills and abilities
Wheelchair bound	Uses a wheelchair
Client	Person or Individual
Has behavior issues	Needs behavior supports

Service Documentation Practices to Avoid

- Altering records
- Copying and pasting
- Being too subjective
- Using shorthand or abbreviations
- Sharing passwords
- Leaving phone, tablet, computer unattended

EVV ≠ Service Documentation

Electronic Visit Verification (EVV) is a system that electronically records and validates Medicaid-funded services provided fully or partially in the home.

EVV ***does not*** qualify as service documentation.

Impact of Improper Service Documentation

- Disrupts needed supports and services
- Affects the health and safety of the person
- Medicaid fraud, waste and abuse investigation:
  - Documenting services you didn't provide for financial gain
  - Providing services in ways that do not align with DDD and/or Medicaid requirements

Service Documentation Review

Who reviews your documentation?

- Acumen, Employer of Record (EOR), Other SDEs
- Person being supported, Authorized reps, guardians
- Clinical staff & Support Staff
- Division staff, including Division leadership
- Office of Program Integrity & Accountability (OPIA)
- Support Coordinator & Support Coordinator Supervisor
- External auditors (Medicaid/Medicare, Mercadien)
- External legal entities

Service Documenation: Important Reminders

- Service documentation must meet minimum DDD requirements **and** align with Acumen/Fiscal Intermediary's policies.
- Quality service documentation leads to more individualized supports and better quality of life.
- Service documentation needs to be timely, accurate, and thorough.
- Words matter.
- Improper documentation can impact a person's services, which can affect their health and safety.
- The SDE plays an important role in communication between the person and their service planning team.

Acumen DCI EVV Systems Training

Welcome to Acumen!

Thank you for joining the Acumen Family!

Acumen Fiscal Agent

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DIRECT CARE INNOVATIONS

Acumen powered by DCI

Helping create a positive, long-lasting impact on people's lives.

What is DCI?

DCI is the electronic invoicing system that allows self-directed employees and community vendors to securely submit documentation for payment approval by the Employer.

<u>Web Browsers</u>

- ✓ Google Chrome (DCI Preferred)
- ✓ Firefox
- ✓ Edge
- ✓ Safari

DCI Requirements

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Devices & Operating Systems (OS)

Apple

- OS: iOS version 15.0 or later
  - ➢ Devices:
    - ✓ iPhone 6s or 6s Plus or later device
    - ✓ iPhone SE
    - ✓ iPod touch (7th generation)

Android

- OS: Android version 8.0 or later
  - ➢ Devices:
    - ✓ 4.6" screen or larger
    - ✓ Due to the wide range of Android devices, we are unable to provide a device list.

Self-Directed Employees - Enter Time

They select one per shift (each clock in/out)

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Mobile App

OR

Phone EVV

OR

Web Portal

Mobile App

- ***Preferred Method**
- Real Time Entry – **EVV compliant**
- Quick & Easy
- Mobile App Guide

Phone EVV

- Landline
- Real Time Entry – **EVV compliant**
- Historical Entry – Non-EVV compliant
- Option when access to a mobile device or computer is limited

Web Portal

- **Only used for service interruptions**
- Time Management
- Historical Entry & Corrections – Non-EVV compliant
- Manual Time Approval
- Profile Settings
- ***Includes Mobile Web Portal –** Mobile-friendly web portal version accessed via smartphone or tablet

Mobile App Download & Login

- Used for clocking in and out for real-time entries
- Preferred, EVV-compliant method
- Can be downloaded on a mobile device or tablet
- View all entries including status & details

Download DCI Mobile EVV

1. Download the ***DCI Mobile EVV*** App

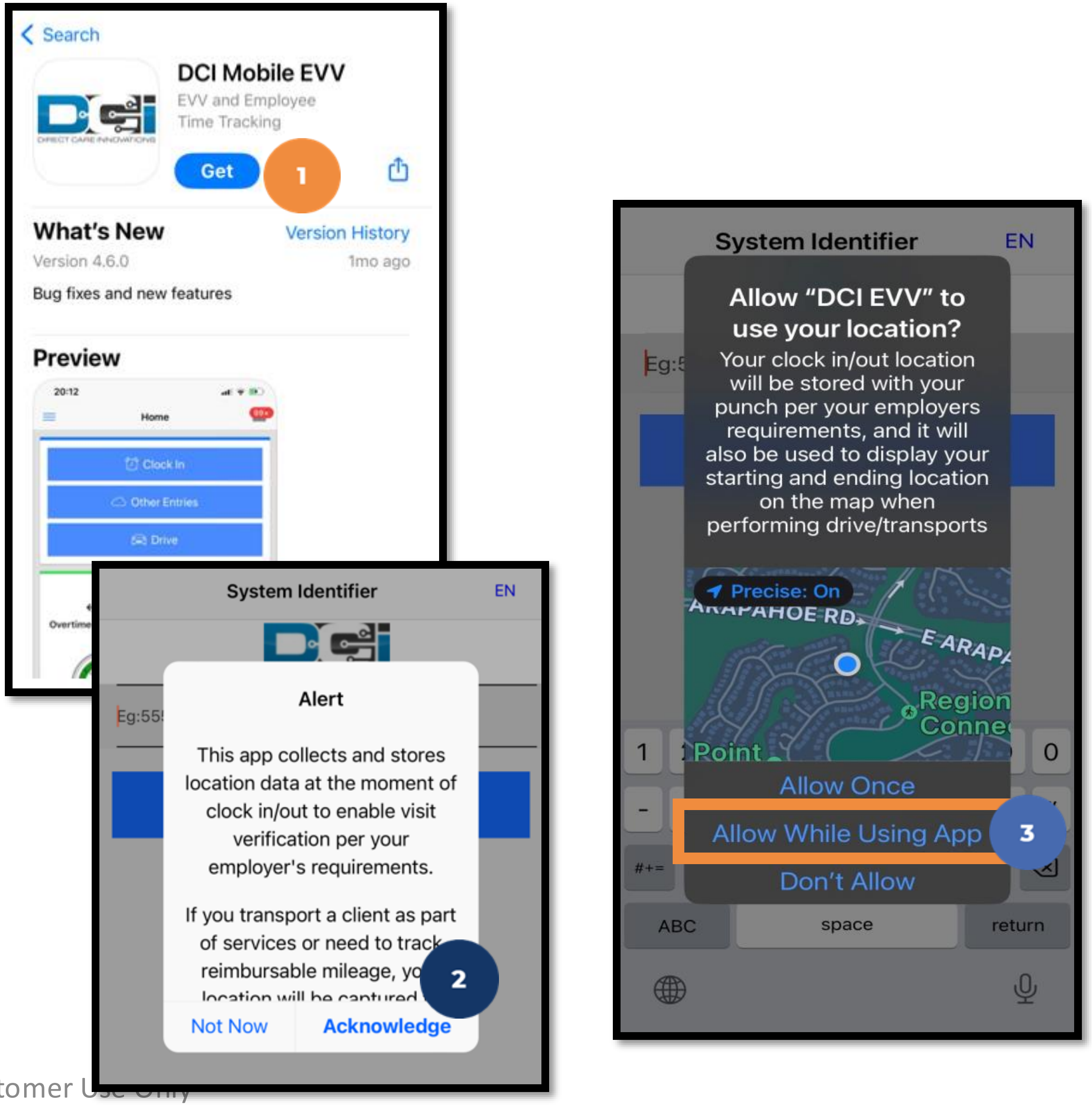
Available on the App Store | GET IT ON Google Play

2. Select Acknowledge on the Alert
   - The alert states the app collects and stores location data at clock in and clock out, if you transport a client as part of services and/or need to track reimbursable mileage

3. Select **Allow While Using App** only when accessing the app for the first time or after a new download to give the app access to the device's location
   - Location is only captured at clock in & out

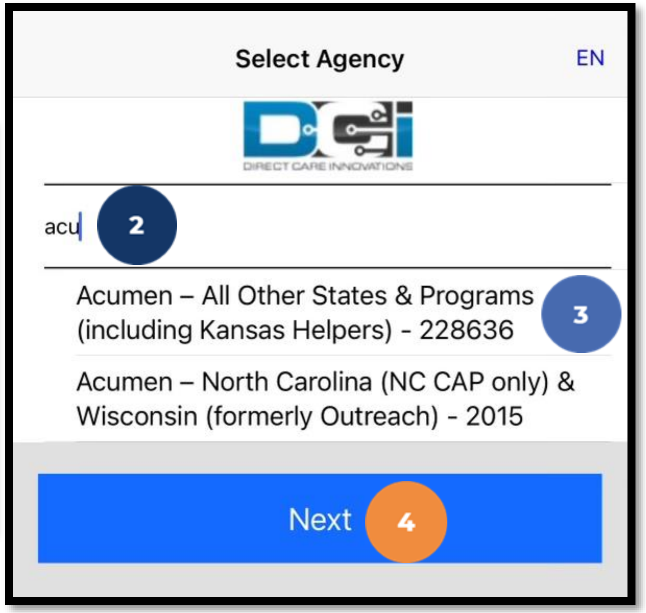
***Please note!**

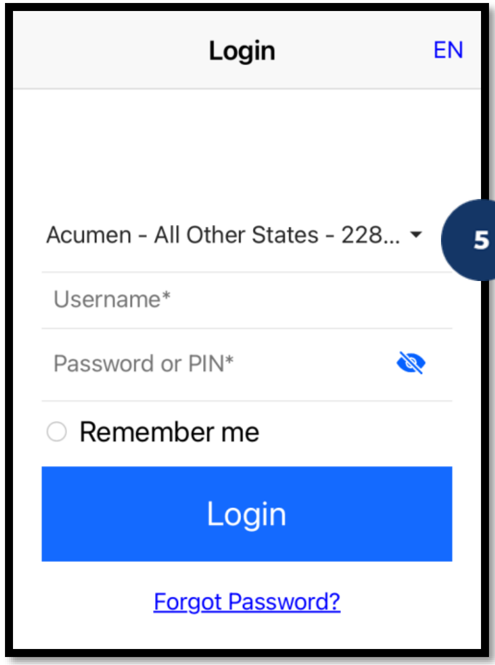
- There is more than one DCI app available. Please be sure to select the one labeled **DCI Mobile EVV.**
- Users may need to set app permissions. Media access is not necessary.



Agency Selection

1. After downloading the app, the Select Agency screen appears with a Search Agency field.
2. **Type at least three consecutive characters of the agency name OR the system identifier** in the Search Agency field
   - ❖ The Acumen system identifier for All Other States & Programs (including Kansas Helpers) is **228636**
   - ❖ The consecutive characters can be located anywhere in the agency name or system identifier
3. **Select the agency** from the list
4. Click the blue **Next** button
5. The agency is now selected and appears on the login screen



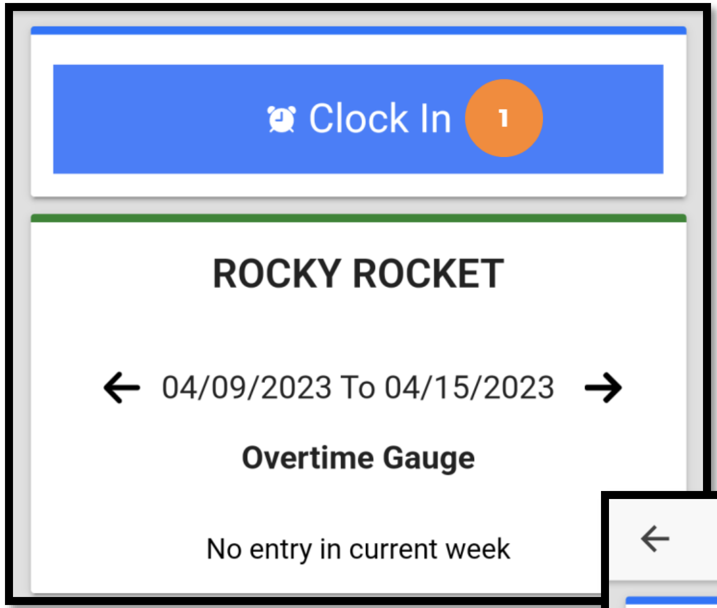


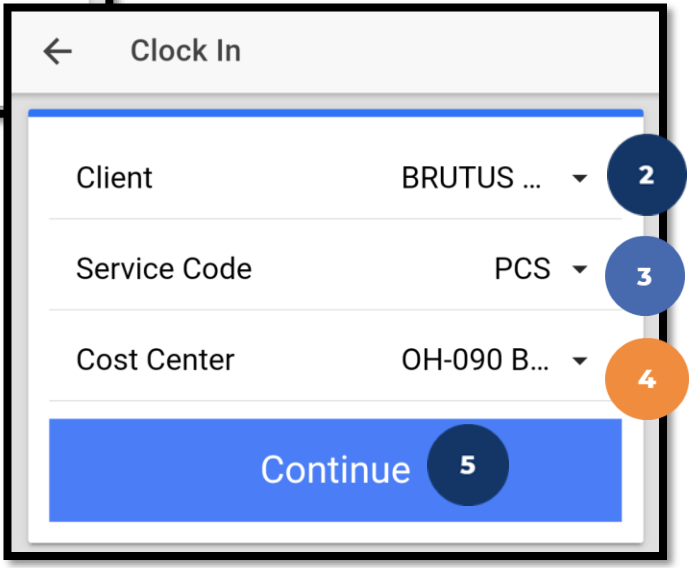
DCI Mobile App

Clock In/Out Process

Clock In on Mobile App

1. Click the blue **Clock In** Button
2. Select the Individual/Client's Name
   - Auto-fills for a single client
3. Select the Service Code
   - Auto-fills for a single service
4. Cost Center is always auto-filled
5. Click the blue **Continue** button





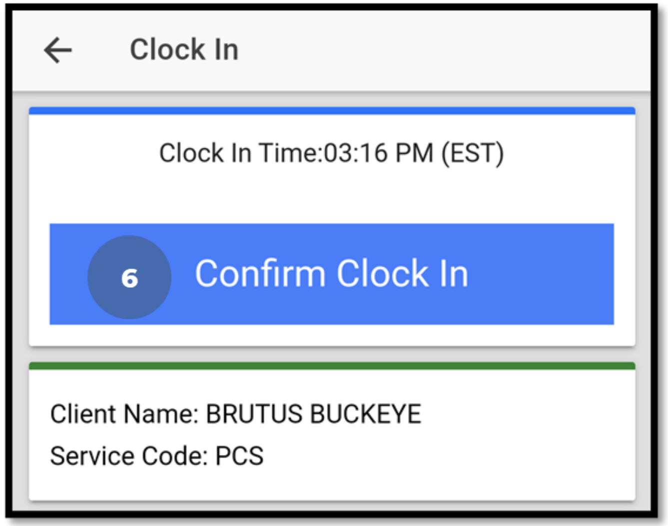
Clock In on Mobile App (cont.)

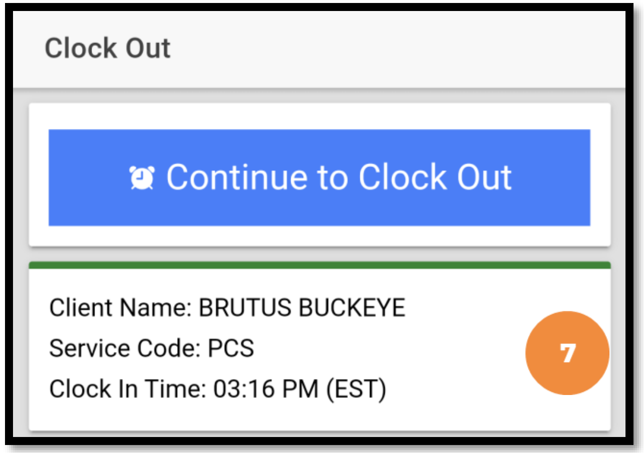
6. Select Confirm Clock In

   * *This will start the time for the shift*

7. Clock In Details Summary

   - Clock in is successful when the blue **Continue to Clock Out** button displays
   - Clock in details display in summary form



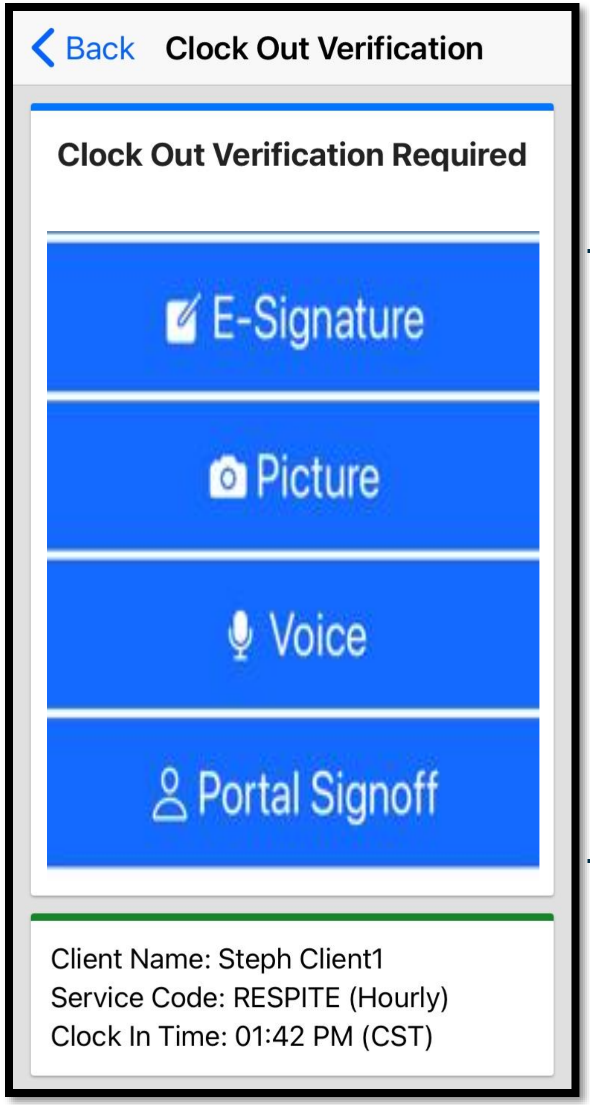


***Please note:** Users do not need to stay logged into the mobile app during their shift and cannot take any other action until clocked out.

Clock In/Out – EVV Options

- EVV (client attestation) options are visible if required by the program. They allow the client to verify that they received service.
  - ✓ Choose only **one** option per shift (each clock out)
- Client attestation is an extra layer of protection against potential fraud because the client/employer is "signing off" on the punch in real time

***Please note:** The employer must still review and needs to approve punch entries in their Pending Entries tab each pay period.

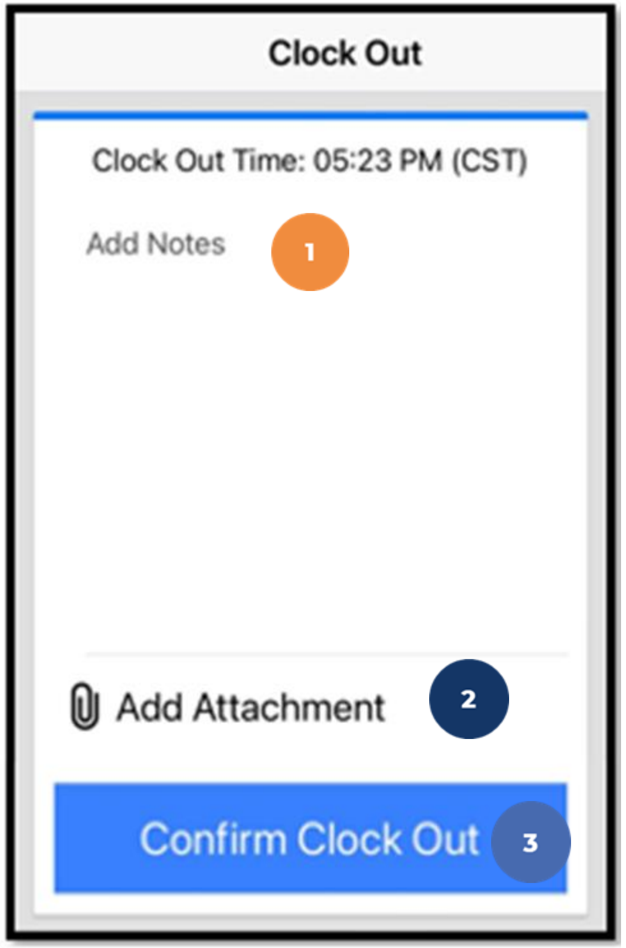


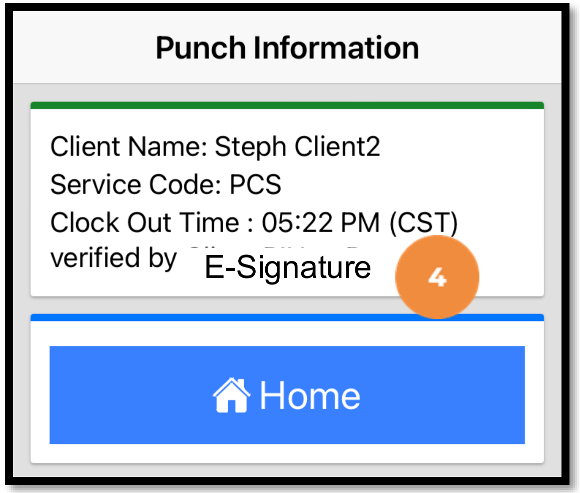
Choose one at clock in/out

Clock Out Process After the EVV (Client Attestation) Option is Selected

The employee:

1. Enters service documentation in the notes section.
2. Click the blue **Confirm Clock Out** button when ready
   - ✓ *This will stop the time for the shift*
3. Punch Confirmation
   - ✓ Punch details, including verification option selected, will display.
   - ✓ Optionally, click the blue **Home** button to return to the dashboard.





DCI Web Portal

Adding a New Entry

***Please note!** Web Portal (historical) entries are only used for a missed punch or punch correction due to service interruption. The goal should always be to enter punches in real time (Mobile App) to maintain EVV compliance.

Add New Entry

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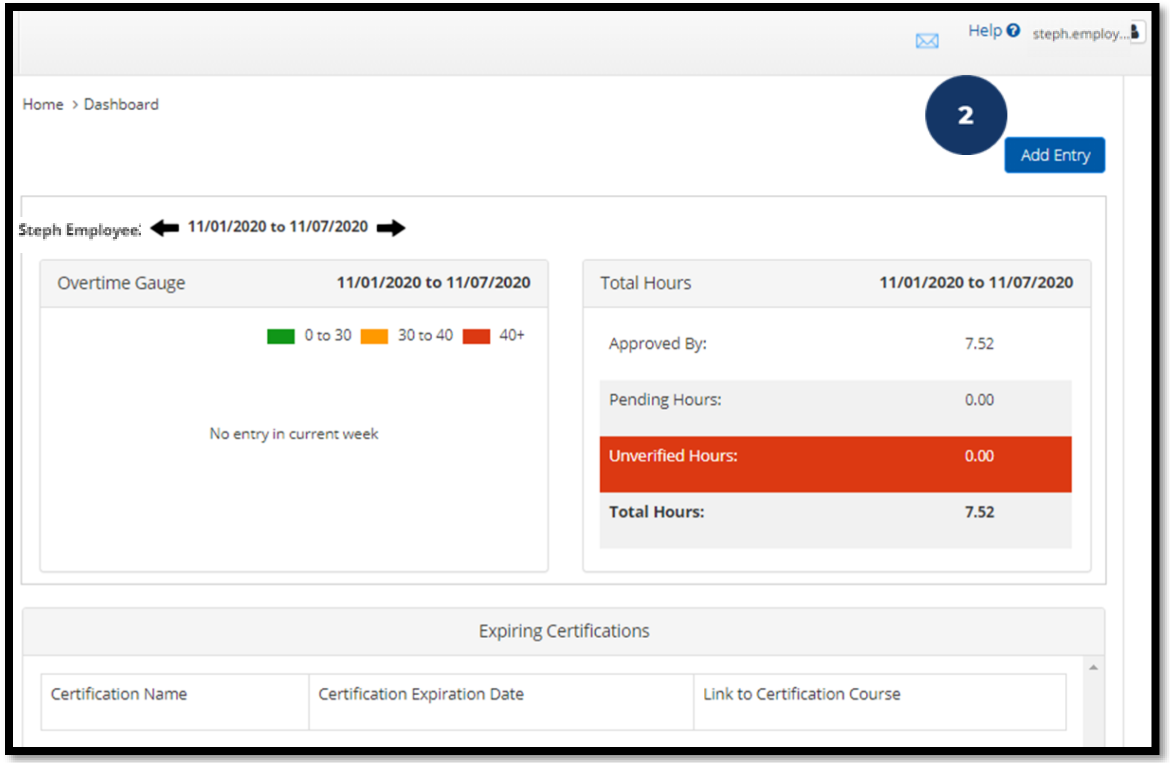
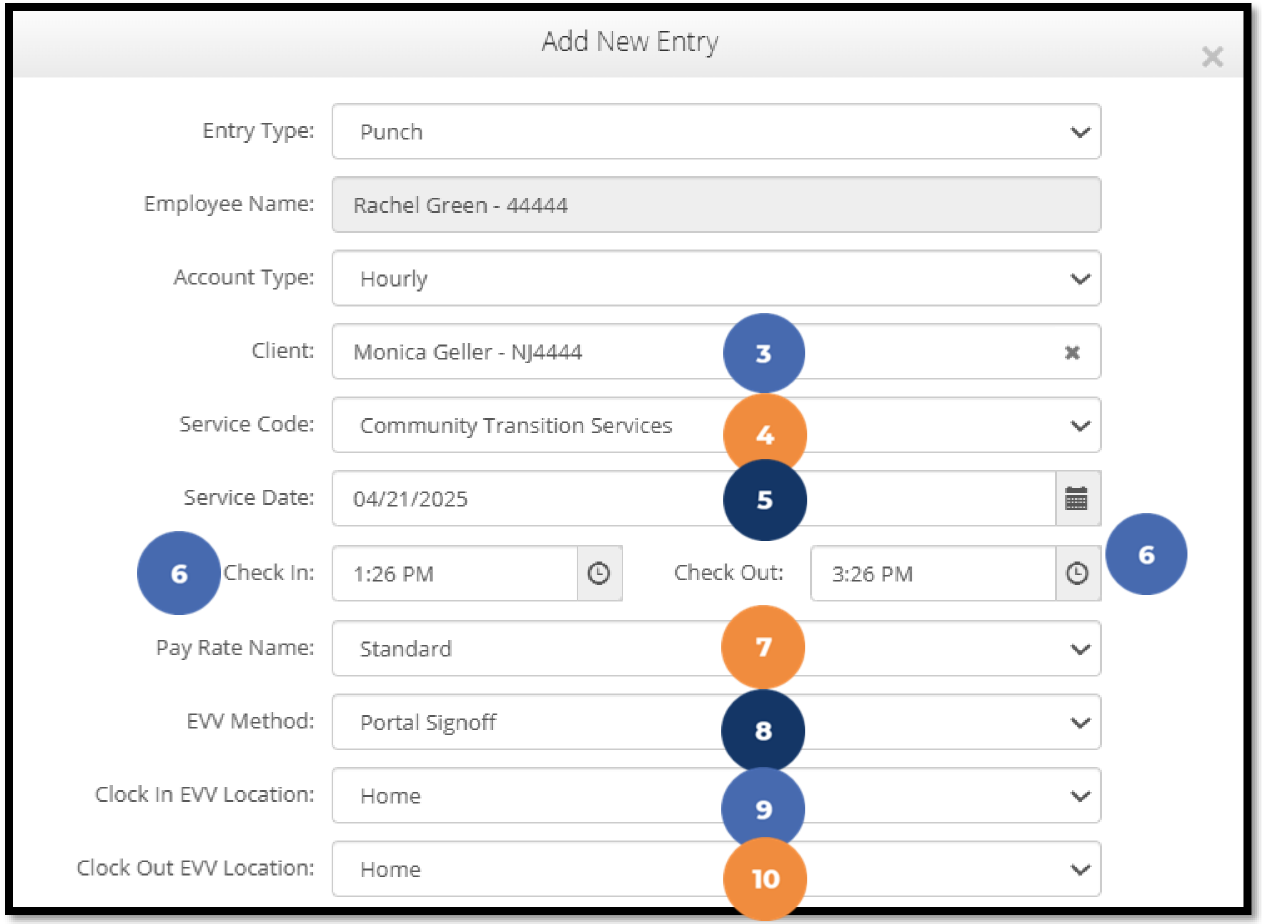
1. Log in to the [DCI Web Portal]
2. Click the blue **Add Entry** button



Add New Entry (cont.)

Note: The first three boxes will autofill

3. Type a minimum of three characters to generate results and select the **Client's name** from the list
4. Select the **Service Code** from the drop-down
5. Select the **Service Date**
6. Enter the **Check In** (start) and **Check Out** (end) times
7. Select the **Pay Rate Name**
8. Select **Portal Signoff** as the EVV Method
9. Select **Clock in EVV Location**
10. Select **Clock out EVV Location**



Add New Entry (cont.)

11. Check Out Date is Auto Selected

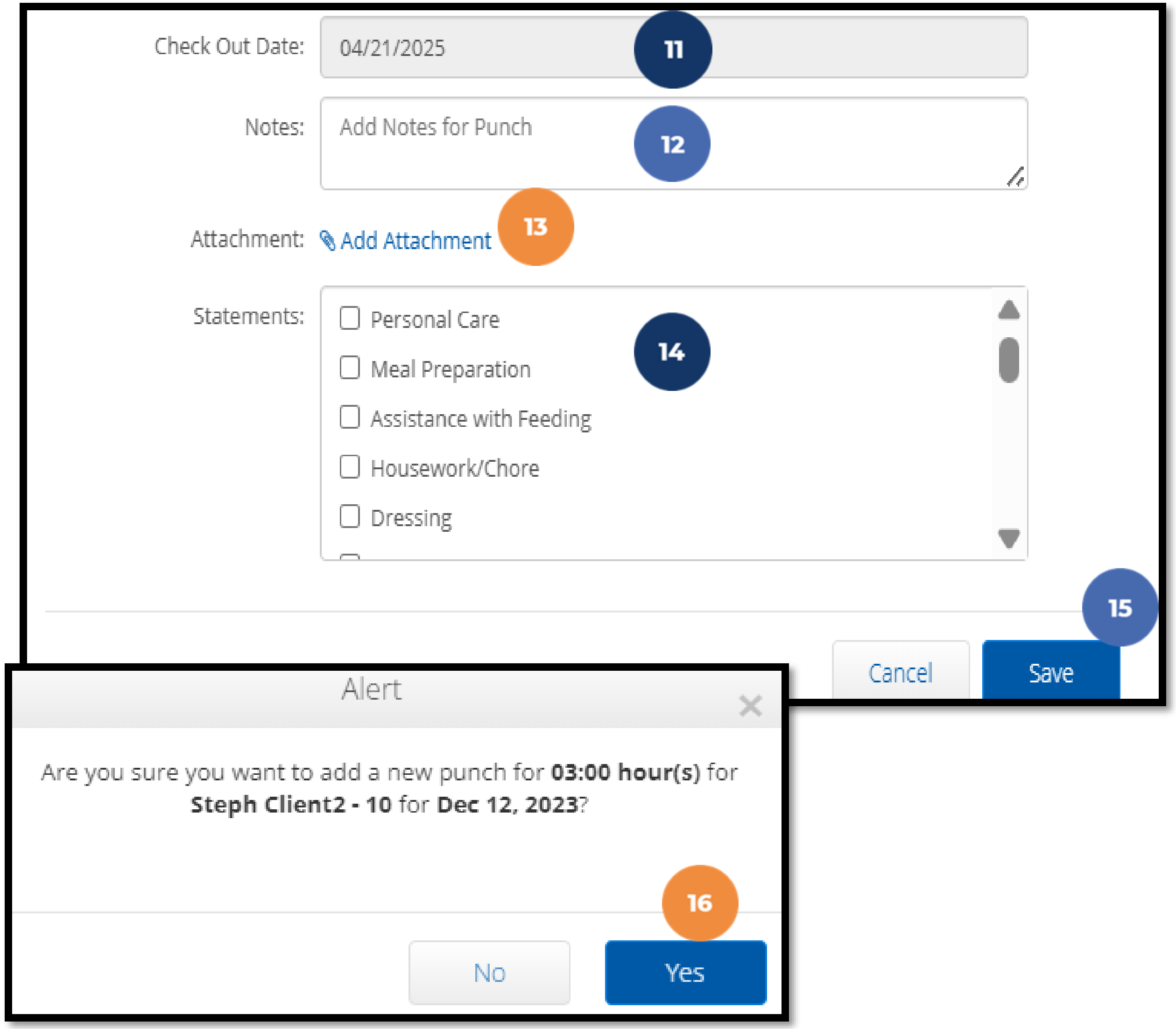
12. Add service documentation

13. Click the **Choose File** button to select and upload Attachments (optional)

14. Select at least one **statement/task** that occurred on the shift (Ex: Personal Care, Meal Preparation, Housework, Dressing, etc.) – *We will review on the next slide*

15. Click **Save** to save the Entry

16.Click **Yes** to submit



Canned Statements/Tasks

Must select at least **one** canned statement/task from the list, per shift (more than one can be selected if more than one were completed on the shift.

Canned Statements/Tasks
Meal Preparation
Assistance With Feeding
Housework/Chore
Dressing
Transportation
Personal Care (Shaving, Grooming, Etc.)
Shopping (Grocery, Supplies, Personal Items, Etc.)
Housekeeping/Cleaning
Accompany to Medical Appointment(s)
Accompany to Classes
Accompany to Recreational Activity
Community Outting
Mobility and Transfer Assistance
Educational Acitivites (Reading, Writing, etc)
Laundry
Interperter Service
Individaul Service Plan or Related Work
Service Procurment/Planning
Respite

Manage & View Entries

Review & Approve Entries

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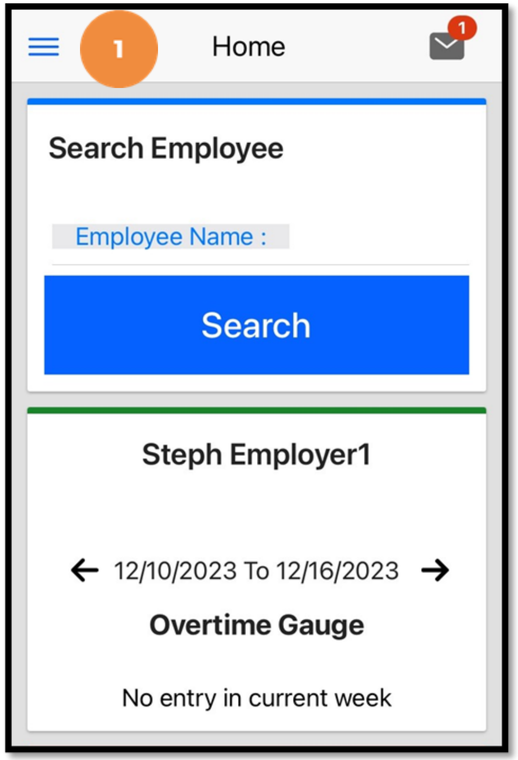
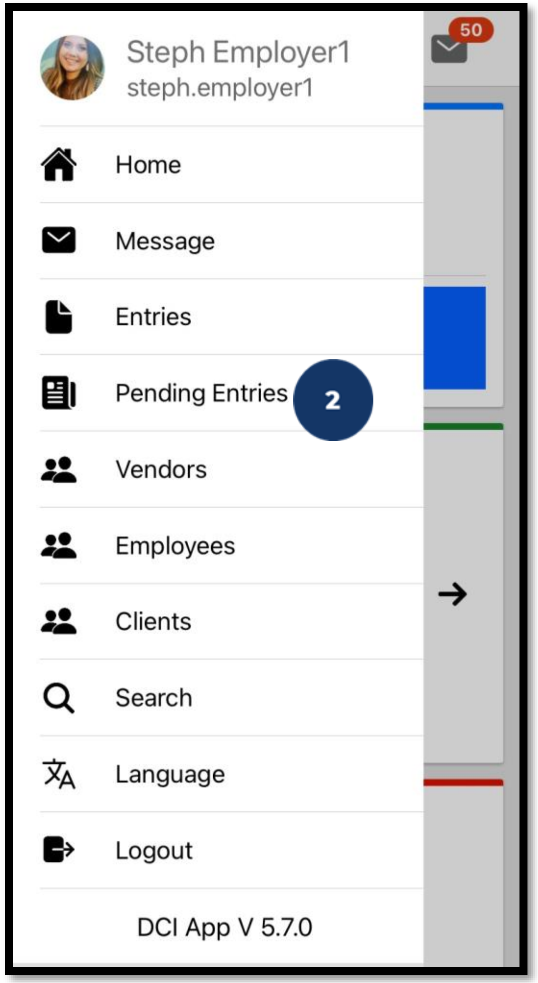
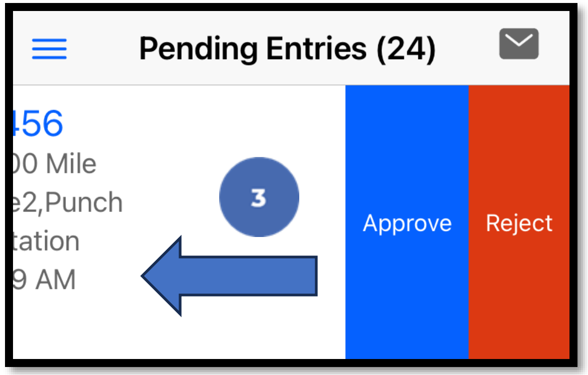
1. Click the **Menu** in the top left corner of the screen
2. Select **Pending Entries** on the submenu
3. **Swipe left** on the punch to select either the blue Approve button or the red Reject button

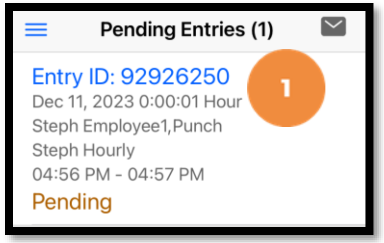


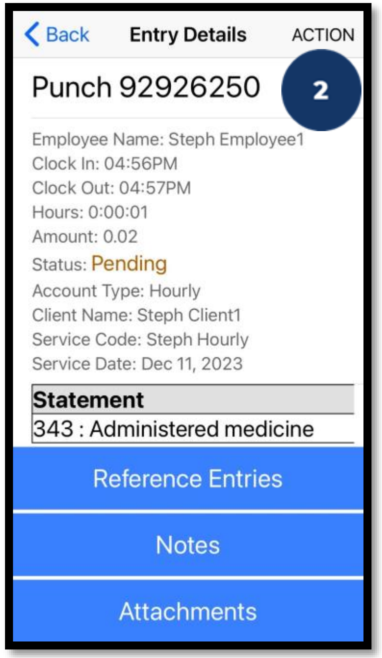


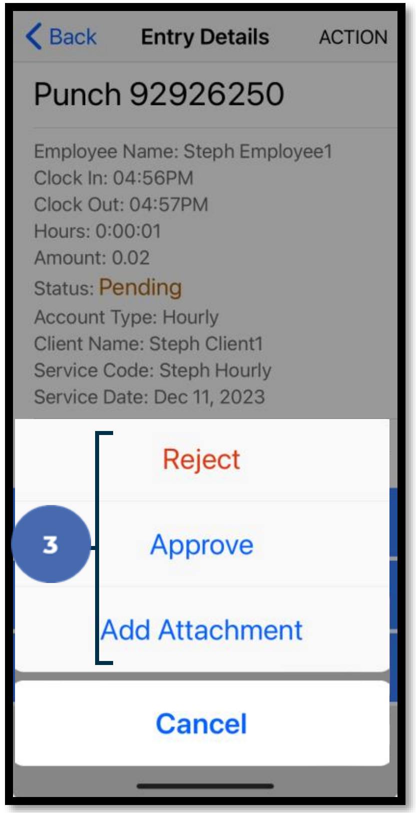


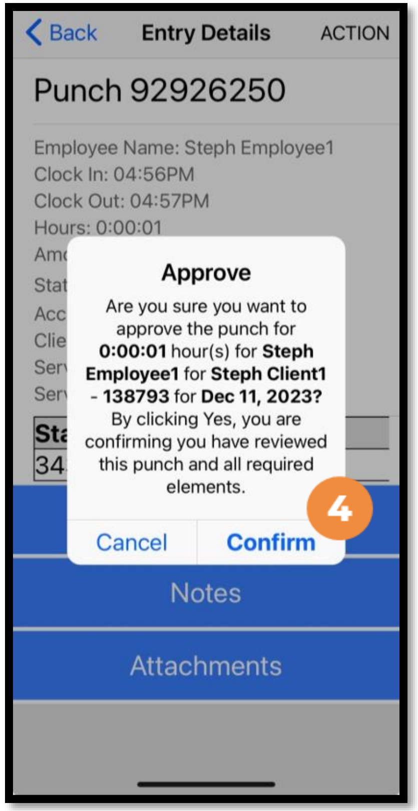
Review & Approve Entries (cont.)

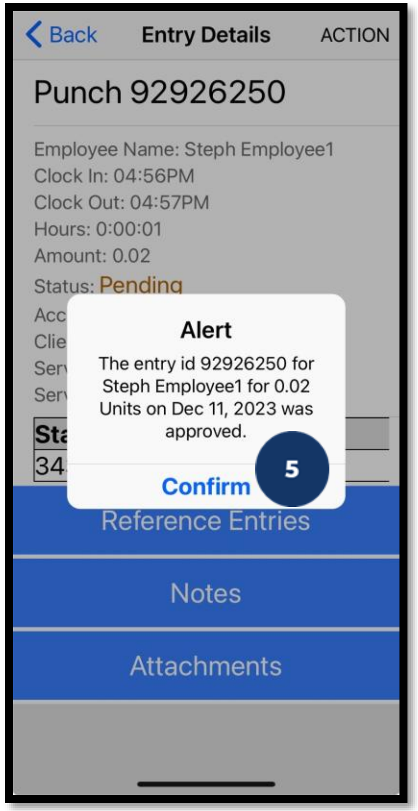
1. Alternatively, click the blue **entry ID** hyperlink to open the entry details
2. Click **ACTION** in the top right corner
3. Select **Reject**, **Approve**, or **Add Attachment**.
4. On the pop-up alert window, view the punch details and Click **Confirm** to initiate the confirmation process.
5. On the pop-up alert window, click **Confirm** again to complete the confirmation process.











***Please note:**

If the action taken was to approve the entry, the status changes to Approved and the entry will be processed for payment.

***The program may have a timely filing rule meaning that entries must be approved within a certain number of days from the date of service.**

Web Portal - Navigation, Profile Settings, Messaging & Dashboard

Full Site – Most compatible when accessed via desktop or laptop

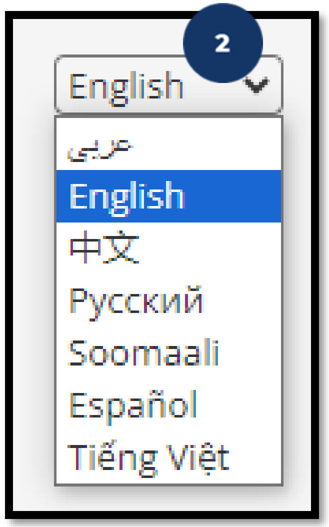
- The employer reviews and manages time
- Employees correct punches and/or enter historical time
- All users may update profile settings

Accessing the DCI Web Portal

1. Open an internet browser on a computer or mobile device (Google Chrome is preferred) and navigate to the DCI Web Portal
2. Use the language drop-down in the top right corner to select the preferred language
   - The page will now display in the new language each time you log in
3. Enter **username** and **password**
   - Credentials provided by Acumen
4. Utilize the "**Forgot your password?**" link if needed
5. Click the blue **Sign In** button

***Please note:** Contact Acumen with login issues

1 acumen.dcisoftware.com



View Paystubs/Statements via Messaging Module

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1. Locate the Paystub/Statement message in the inbox and click anywhere on the line to view it
2. Click the **Attachments** tab
3. Click the **eye** icon in the download column to view the paystub/statement or the **download** icon to download it

	★	Attachments	From	Subject	Date/Time	Action
			DCI Support	Account Statement	07:42 AM	

1

Notes | Attachments

2

	Date	File Name	File Type	File Size	Added By	Download	Status
	Aug 27, 2024	Account Statement.pdf		82.16 KB	Stephanie Smith		Active

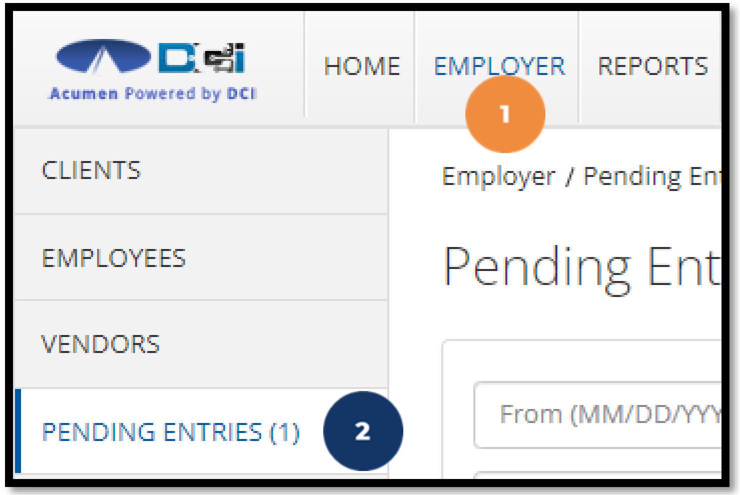
3

Manage Entries

Navigate to Pending Entries

1. Click **Employer** on the main menu

2. Select **Pending Entries** on the submenu
   - ✓ The number of pending entries displays in parenthesis on the submenu
   - ✓ All entries requiring review/action appear in the table



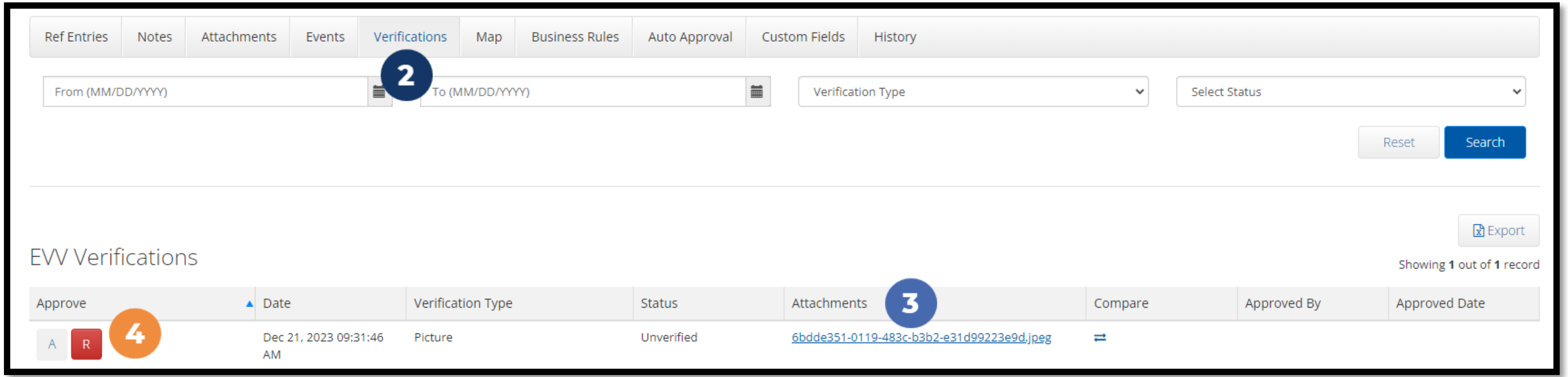
3. Hover over the icon in the Needs Review column to see what specifically requires review
   - ✓ Gray Question Mark indicates Portal Signoff Pending. The entry can be approved.
   - ✓ Red Eye indicates that action must be taken to resolve the issue before the punch can be approved

Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Estimate)	Client Name	Employee Name	Service Code	Account Type	Needs Review
A R	Sep 04, 2024	10:56 AM	10:59 AM	12.00	0:00:03		Steph Client1	Steph Employee1	RESPITE (Hourly)	Hourly	
A R	Jun 05, 2024	10:52 AM	10:53 AM	26.00	0.02	0.52	Steph Client1	Steph Employee4	RESPITE (Dollars)	Hourly	
A R	Sep 25, 2024	01:11 PM	01:13 PM	12.00	0:00:02		Steph Client2	Steph Employee1	RESPITE (Hourly)	Hourly	
A R	Sep 25, 2024	01:09 PM	01:10 PM	12.00	0:00:01		Steph Client2	Steph Employee1	RESPITE (Hourly)	Hourly	

Verify Signature, Picture, or Voice

1. If an entry has a red eye icon in the Needs Review column, hover over it to see why it needs review. If it states, “Signature Unverified”, “Picture Unverified”, or “Voice Unverified”, **click anywhere on the entry row** to open the punch details page.
2. Scroll down to select the **Verifications** tab
3. Click the **attachment** to review the signature or picture. Click the **download** icon to download, open, and listen to the voice recording.
4. Click the **A** to approve the attachment or the red **R** to reject it. The punch may now be approved or rejected.

Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Estimate)	Client Name	Employee Name	Service Code	Account Type	Needs Review
A R	Feb 25, 2025	11:18 AM	11:19 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code		- Voice Unverified
A R	Feb 25, 2025	11:17 AM	11:18 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code		- Picture Unverified
A R	Feb 25, 2025	11:16 AM	11:17 AM	14.00	0.02	0.28	Steph Client	Steph Employee	PCS Service Code		- Signature Unverified



Manage Pending Entries

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***Important!** Entries must be both entered **AND** approved within 60 days from the date of service

Approve	Service Date	Start Time	End Time	Pay Rate	Amount	Cost To You (Estimate)	Client Name	Employee Name	Service Code	Account Type	Needs Review
A R	Sep 05, 2024	01:49 PM	01:51 PM	20.00	0:00:02	0.60	Steph Client3	Steph Employee3	SDFSS	Hourly	
A R	Sep 05, 2024	01:41 PM	01:43 PM	20.00	0:00:02	0.60	Steph Client3	Steph Employee3	SDFSS	Hourly	
A R	Sep 04, 2024	10:56 AM	10:59 AM	12.00	0:00:03		Steph Client1	Steph Employee1	RESPITE (Hourly)	Hourly	

- View high-level punch information on the entry row
- After needed verifications have been performed, click the **A** to approve the entry or the red **R** to reject it.
- Optionally, click anywhere on the entry row to view the details.

Helpful Resources

Utilize our Websites

[New Jersey - Training Materials](#) for **more help**

- This will give you a full list of Training Materials for DCI

[New Jersey State Page](#)

- This will give you New Jersey specific details with Acumen Fiscal Agent

Contact the Acumen Support Team

For help with enrollment questions, DCI system questions, or payment issues

Contact Us form at www.acumenfiscalagent.com/contact

Email us at: customerservice@acumen2.net

By Phone: (833) 892-0413

Acumen Fiscal Agent
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THANK YOU!

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