



**SELF-DIRECTED
SERVICES**

Training Guide

DIGNYFI

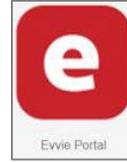
Fiscal Intermediary software specialized for New York self-direction

**Participant/Managing
Employer
Introduction to the Evvie
Portal
Training Guide**

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Evvie Portal



Introduction

Evvie Portal is a web-based application (portal) that you will use to log in and approve or deny shift details that an SDS Worker has submitted for a visit. Once you have approved a visit, the shift details are sent to the Fiscal Intermediary's payroll department for payment.

Portal Log In

1. Log in using the credentials you used when creating this account.



If you have forgotten your password, click **Forgot your password?** and follow the instructions..

2. Click **Log in**. The Evvie Portal displays; or
3. From the notification email, click the link to log in and view the details of the shift. This method is further explained below.

A new shift has been submitted for your review in ET+!

To log in and view the details for this shift, just follow this link: <https://etimesheets-plus-cpma-evvie-1.qc.bluebedrock.com/shifts/1>

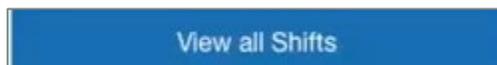
Approve Visits

All visits submitted through the Evvie Mobile application will appear in the Evvie Portal for your approval or denial. Both you and the SDS Worker will receive a notification email once a visit is successfully transmitted to the Evvie Portal and an email notification alerting you that there is a visit awaiting your approval. You will click the link in the email to be taken to the visit details.

You will take action on any visit with a status of **Submitted**. Regardless if you have approved or denied the visit, the SDS Worker will receive an email alerting them they need to take action.

If any adjustments are made to the visit during the approval process, both you and the SDS Worker will need to approve the visit again before it can be submitted to payroll for payment.

1. From the Evvie Portal homepage, click **View all Shifts**.



2. The Listing Shifts will display all shift details of the SDS Worker (s) who you employ.

- Utilize filters to get to the shifts you would like view; i.e. participant, date range, status.

- Select the magnifying glass icon to the right of any shift that displays a status **Submitted**.
- Shift details will display with color coded action buttons below the shift details. Select the action you wish to perform:
 - If the visit is correct, select **Approve Shift**
 - If the visit details are incorrect, select **Propose Adjustments to Shift**.
 - If the visit is erroneous or in error, select **Propose Denial of Shift**
 - Select **View all Shifts** to return to the list of shifts.

- Select Approve Shift bar.
- The Approve Shift page will display. If desired, add your phone number and comments. Check the box attesting to your signature and click **Submit Approval**. The status moves to **Approved by Participant** and an email notification has been sent to the employee to alert them there is a visit waiting them to **Lock as Approved**.

Deny Visits

Managing Employers may need to deny a visit if the visit was created in error. For example, if the SDS Worker accidentally begins a visit for the incorrect participant but completes it rather than cancels it.

1. Select the magnifying glass icon to the right of any shift that displays a status **Submitted**.
2. Shift details will display with color coded action buttons below the shift details. Select the action you wish to perform:
 - If the visit is correct, select **Approve Shift**
 - If the visit details are incorrect, select **Propose Adjustments to Shift**.
 - If the visit is erroneous or in error, select **Propose Denial of Shift**
 - Select **View all Shifts** to return to the list of shifts.



3. Select **Propose Denial of Shift** bar.
4. Select a Denial Code.
5. If desired, add your phone number and comment.
6. Check the box attesting to your signature, and click **Submit Denial**.

A screenshot of a signature attestation form. It features a checkbox on the left and a paragraph of text on the right: "I declare under penalty of perjury, that all hours worked and descriptions of work performed contained in the submitted shifts, are true and correct, with full knowledge that all of this information may be subject to investigation and that any false or dishonest information contained on these shifts may be grounds for denial of payment and/or reporting of findings to the investigation unit of the Department of Human Services." Below the text is a red button labeled "Submit Denial".

7. The visit is now moved to a status of **Denied by Participant**, and the SDS Worker will receive an email that the Participant has proposed to deny one of their visits.
8. The SDS Worker will log in to review the visit and will be able to view the denial code that the Participant (Managing Employer) selected as to why they proposed the denial of the shift. They can then **Challenge Denial** or **Lock as Denied**.
9. If the SDS Worker selects Lock as Denied the visit is locked and cannot be adjusted again.
10. If the SDS Worker selects Challenge Denial, you will be alerted in your email and you can follow the link to review their response and then proceed to Approve or Deny the visit. You will have the opportunity to repeat this twice.

Adjusted Visits

SDS Workers may need to adjust a visit for a few reasons, such as if they arrive at their shift but cannot clock in because their phone battery is dead. They would then clock in late once the phone is charged and the start time would need to be adjusted.

1. If an adjustment has been made to shift details of a visit by the SDS Worker, you will be alerted in your email and you can follow the link to review the details and then proceed to Approve or Deny the visit. You will have the opportunity to repeat this twice.
2. Follow workflows outlined previously in this guide for Approving and Denying visits.

DIGNYFI Tutorial Videos

YouTube Links to Tutorial Videos

- [Getting Started: External User Account Set Up and First Time Log In](#)
- [Evvie Mobile App: Logging In, Logging a Visit, and Offline Submission](#)
- [Evvie Web App: Logging In, Denying a Visit, Adjusting a Visit, and Entering a Manual Visit](#)