EMPLOYEE USER GUIDE FOR CASHÉ FMS EVV

Fiscal Management Services (FMS)
CDCS/CSG

Lifeworks
A nonprofit serving
people with disabilities

ABOUT CASHÉ FMS EVV

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

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

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

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

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

When submitting an email ticket, please provide the following information:
- Screenshot of error message (if appliable)
- 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 best Date & Time for a returned call.

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GETTING STARTED

SNAPSHOT OF NAVIGATION

Home (Default View)
1st Icon on the bottom of the screen

Care Recipients
2nd Icon on the bottom of the screen

My Profile
3rd Icon on the bottom of the screen

Notifications
4th Icon on the bottom of the screen

Refresh
Upper Right Corner of the screen

Menu
Upper Left Corner of the screen

GLOSSARY

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

MINIMUM SYSTEM REQUIREMENTS

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

- Phone/Tablet
    - iPhone (iOS) – Version - IOS 10 or above
    - Android – Version – Android 6.0 Marshmallow or above

- Website URL – Computer
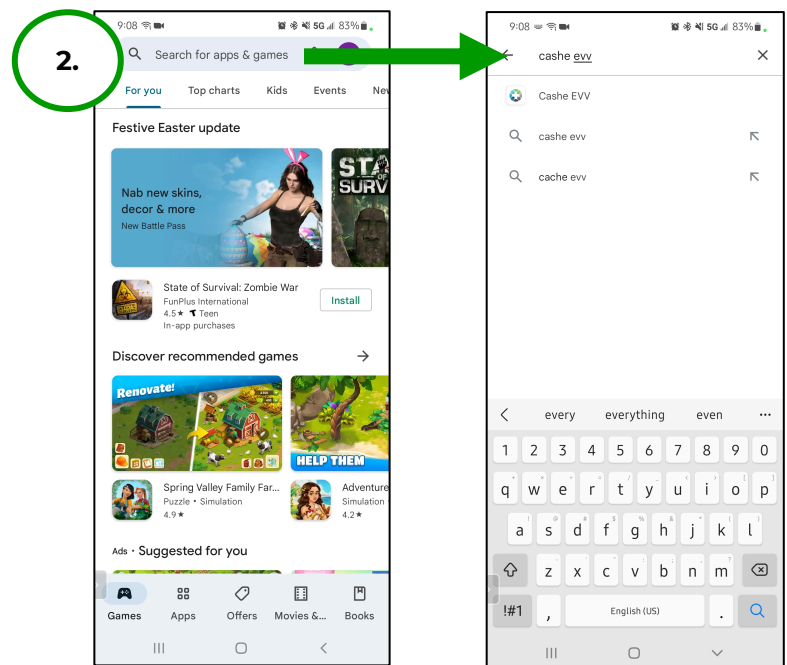   - Google Chrome Version - 88.0.4324 or above

HOW TO ACCESS CASHÉ FMS EVV

ANDROID APP – PHONE AND TABLET

1. On your phone or tablet, select the **Play** icon on your device to open the store. Please note: the Cashé EVV app is free to download.
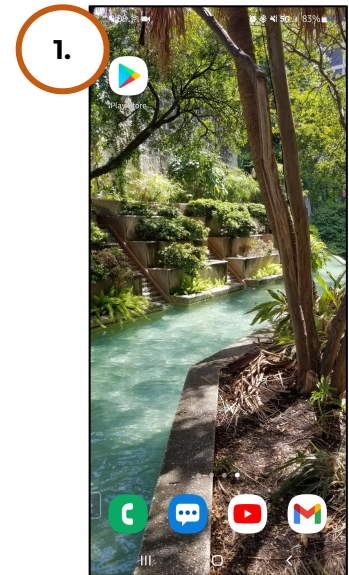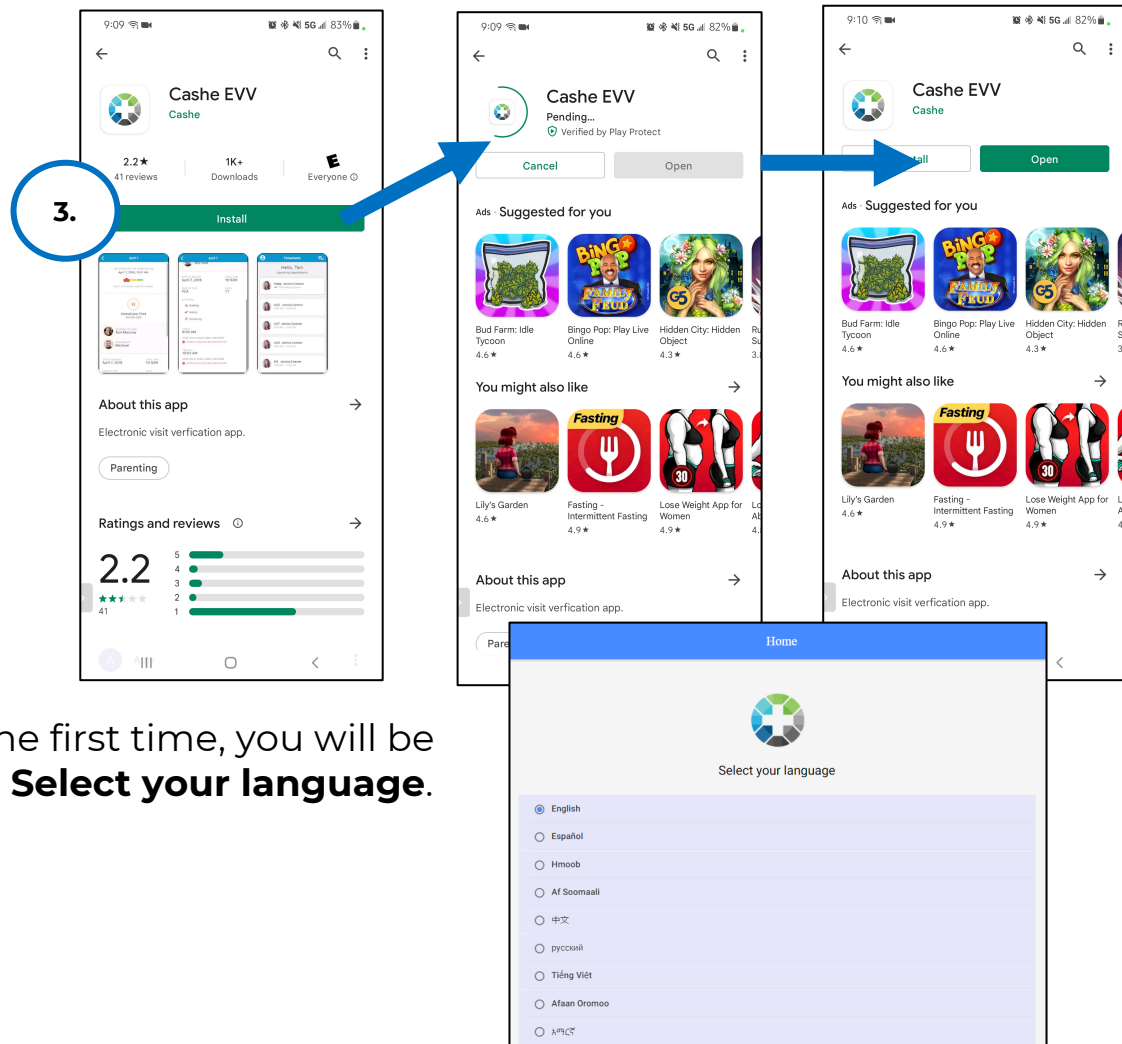
2. In the **search**, type the word **cashe evv** and select the app:
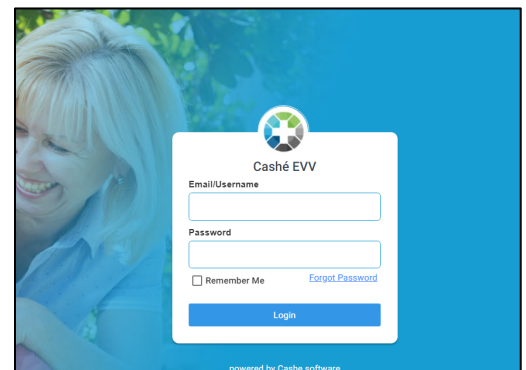
Cashé EVV .

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

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

5. As soon as your preferred language is selected, you will need to select **OK** and will be directed to the Cashé FMS EVV login page.
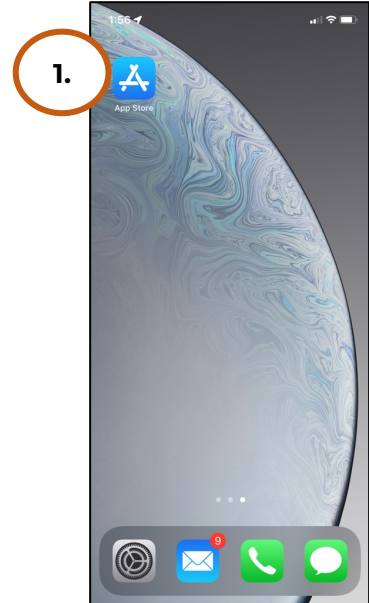
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IOS/APPLE APP – IPAD AND IPHONE

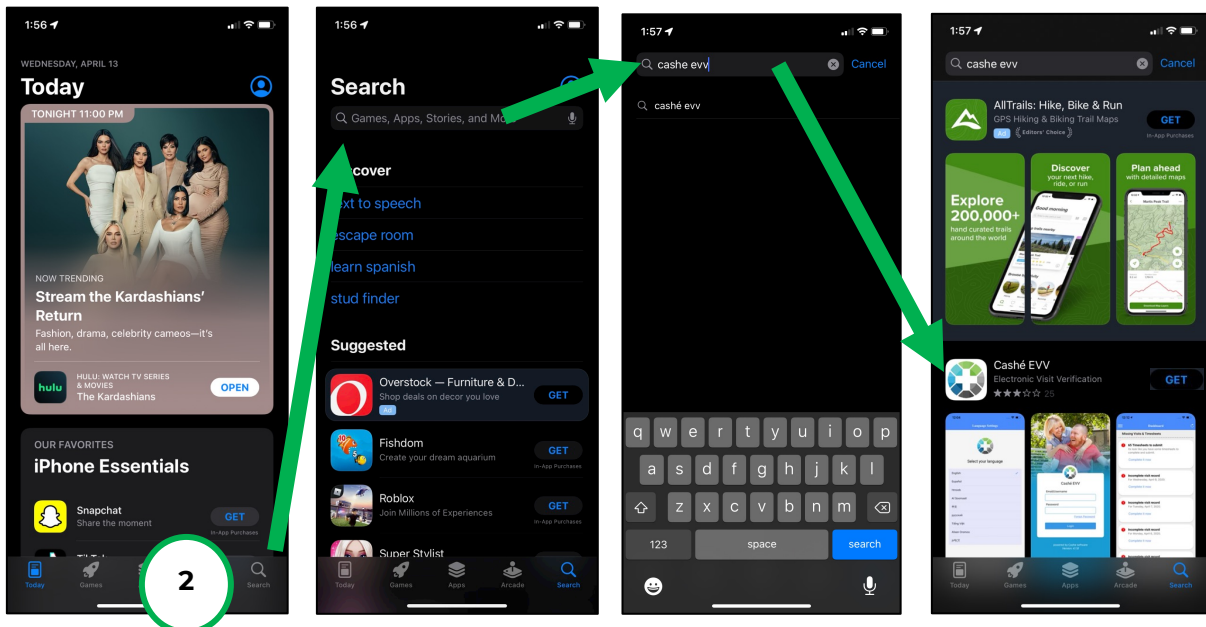1. On your iPad or iPhone, select the

   App Store icon on your device to open the
   store. Please note: the Cashé FMS EVV app is free to
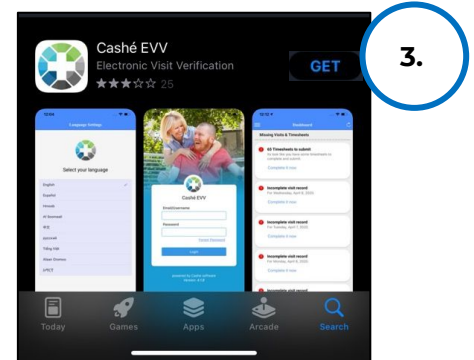   download.

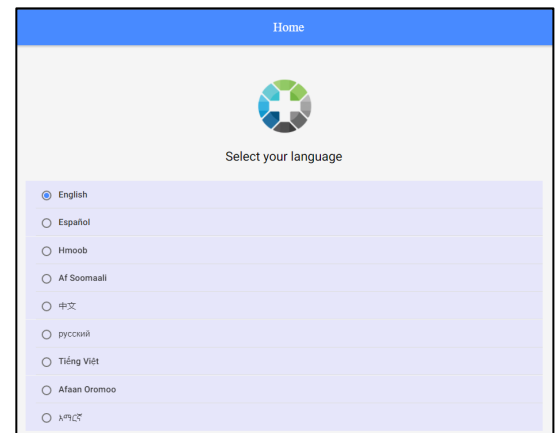2. In the search tab, type the word **cashe evv** and

   select the app: **Cashé EVV** .

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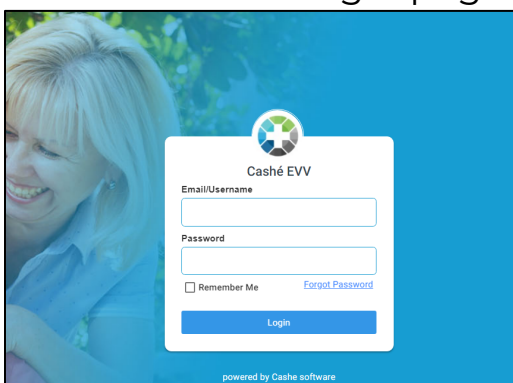people with disabilities

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

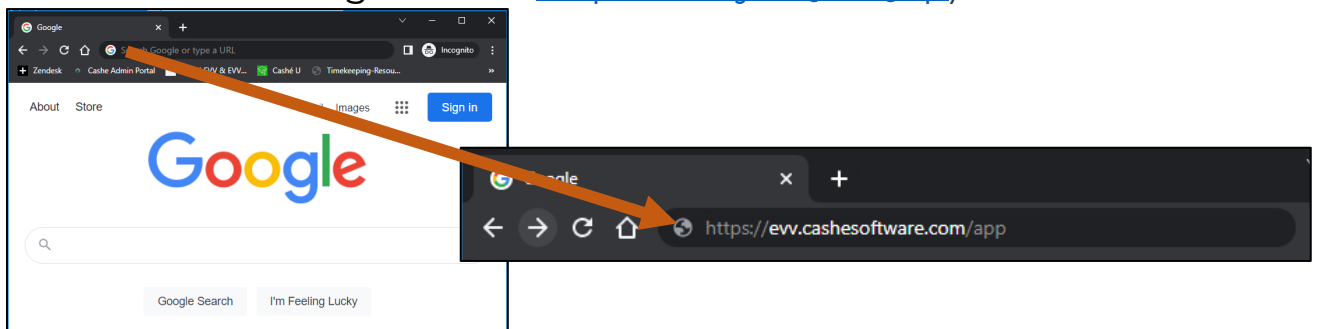4. When opening the app for the first time, you will be prompted to **Select your language**.

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

WEBSITE URL – COMPUTER

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

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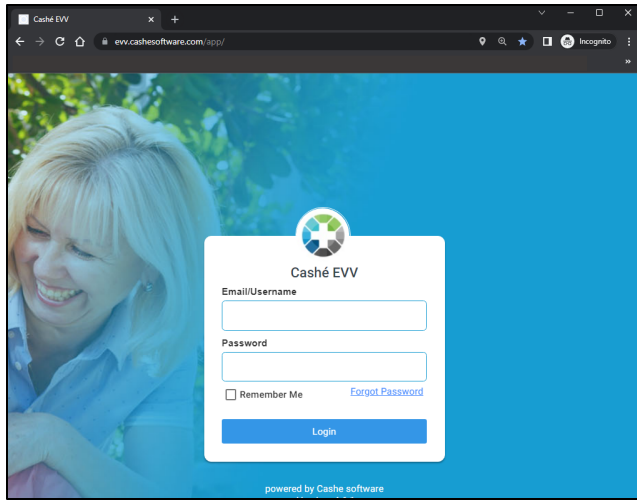

2. Once you press enter, Cashé FMS EVV may prompt you to select your preferred language. You must select your preferred language even if it seems to have already been chosen.
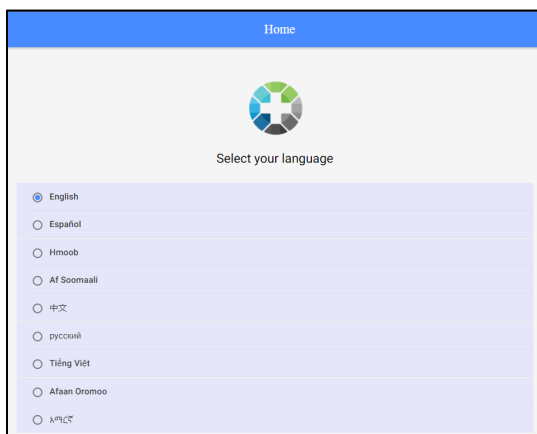

3. <u>As soon as your preferred language is selected, you will need to select **OK** and will be directed to the</u> Cashé FMS EVV login page.

HOW TO LOG IN AND SET UP YOUR PASSWORD

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

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

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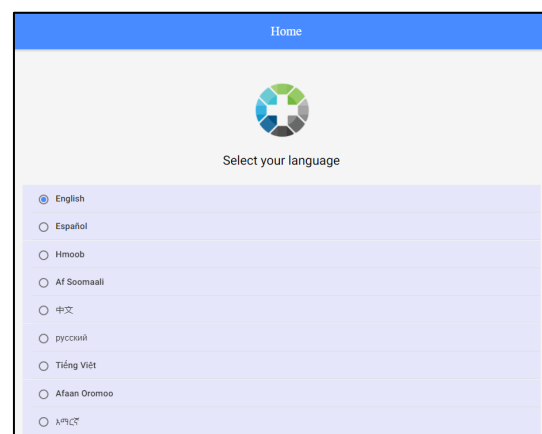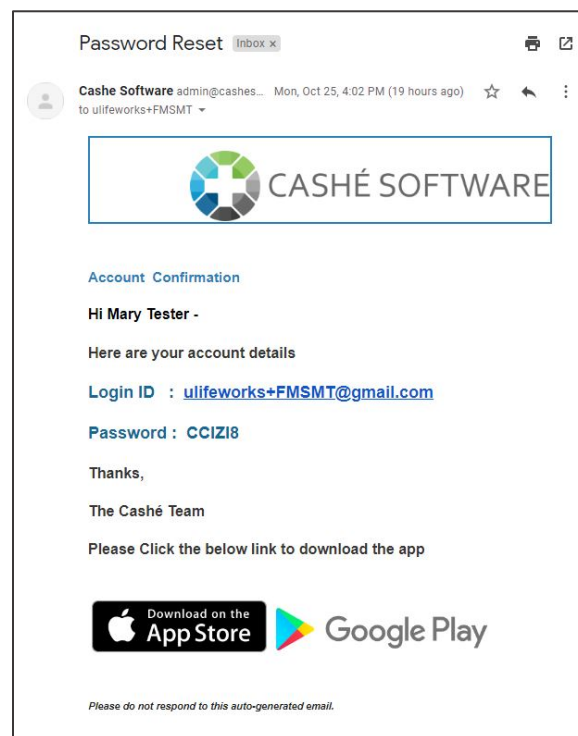
4. On **Language setting has been applied successfully** message, select **OK**.

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

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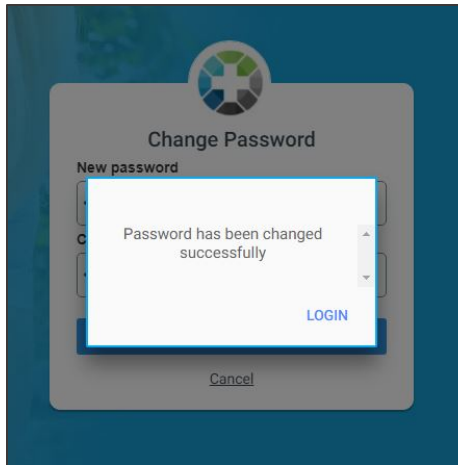   - Lowercase letters (includes spaces)
   - Uppercase letters
   - Special characters (!$%^&*()_+|~-=\` {}[]:";'<>?,/)
   - A number (0-9)
   - Be at least 8 characters in length
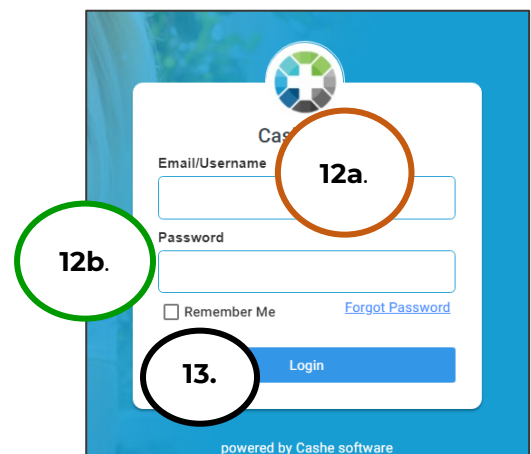9. Enter a New Password of your choosing in the following:
   a. **New Password**
   b. **Confirm Password**
10. Select **Proceed**

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

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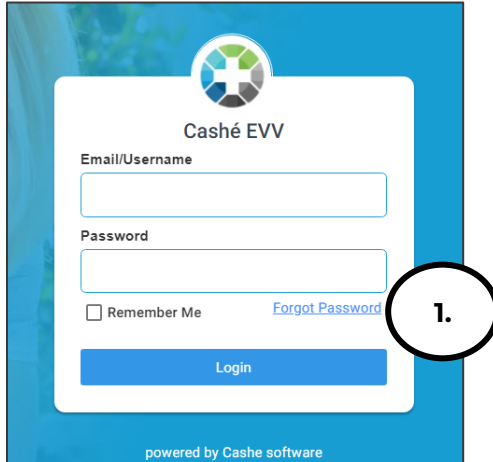   b. **Password** = The password you just created
13. Select **Login**

NOTE: After logging in, you will be redirected to the Home screen of Cashé FMS EVV.
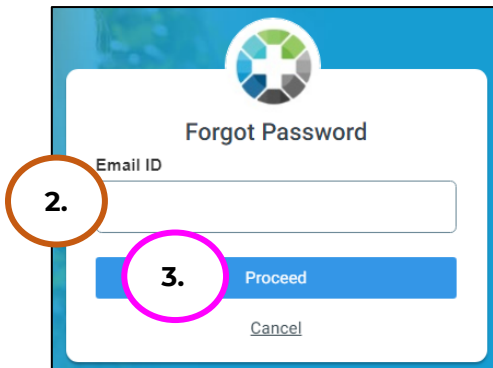
HOW TO RESET YOUR PASSWORD
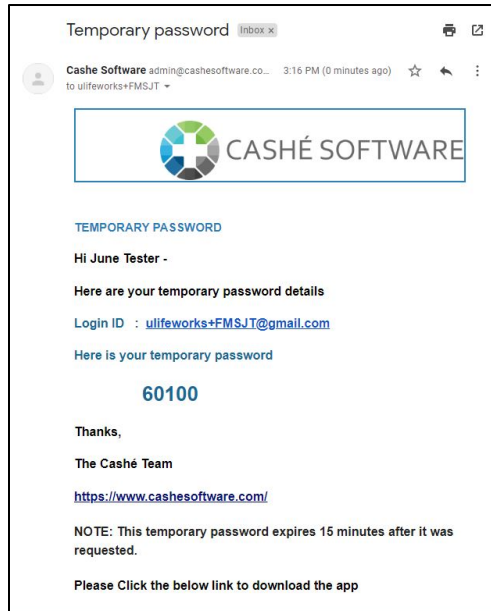
1. On Login screen, select **Forgot Password**

2. Enter **Email ID**
3. Select **Proceed**

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

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

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

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

NOTE: Be sure to follow the password guidelines below:

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

9. Select **Proceed**
10. Once the Password has been changed successfully select **Login**

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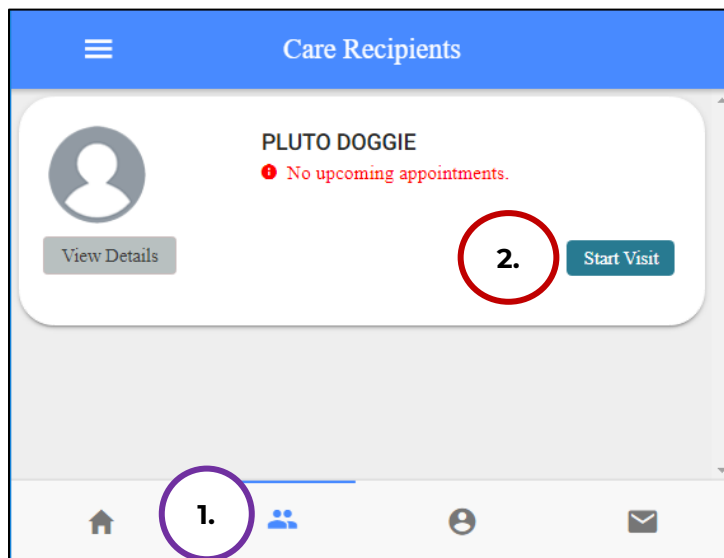   b. **Password** = The password you just created
12. Select **Login**

HOW TO USE CASHÉ FMS EVV: One to One Services

HOW TO CLOCK IN (START VISIT)
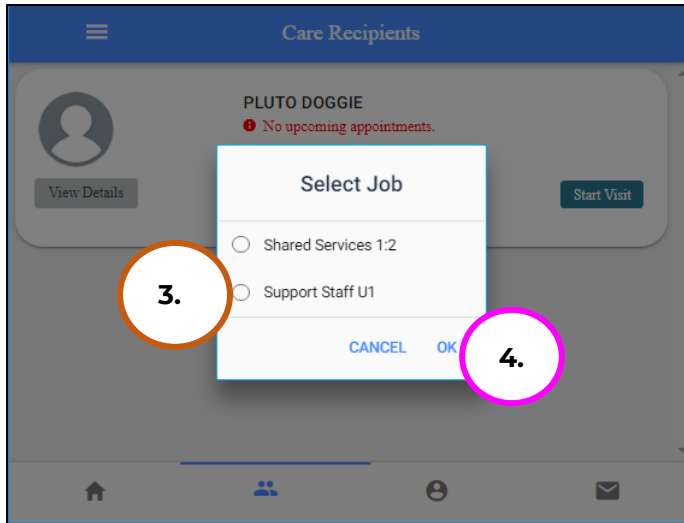
1. Select **Care Recipients**, the 2nd icon located at the bottom
2. Directly under the Participants name, select **Start Visit** to clock in at the beginning of your shift
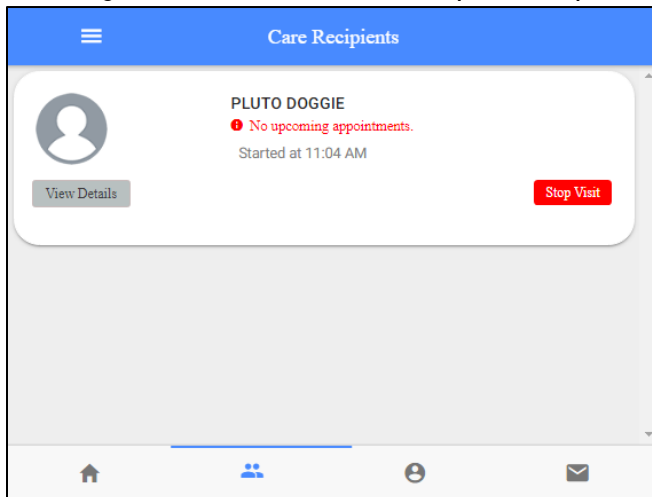
3. In the **Select Job** box, select the service you will provide
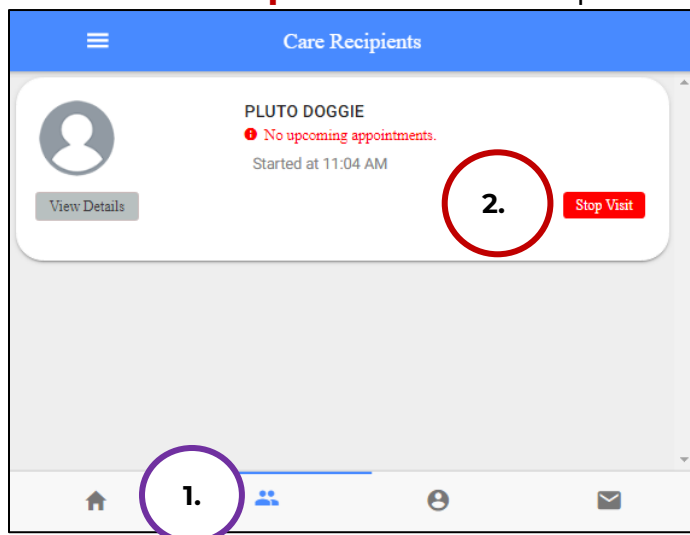4. Select **OK** in the lower right corner.

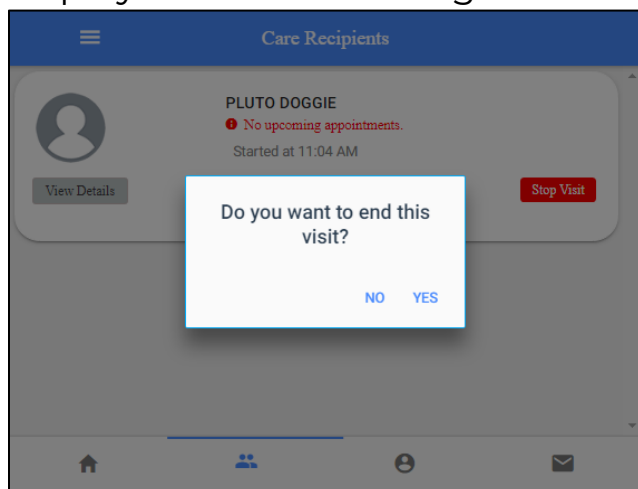5. Start your shift with the participant.

HOW TO CLOCK OUT (STOP) – PART 1

1. Select **Care Recipients**, the 2nd icon located at the bottom
2. Select the **Stop** button for the participant you supported.

3. In the **Do you want to end this visit** box, select the **YES** text displayed in the lower right corner.

4. Optional: In the **Notes** section, type any details about the visit that you would like to share with the responsible party or participant.

Note: You may need to scroll down on your device to locate ALL the details to review.

5. Review the following are correct:
   a. **Service Type**
   b. **Time In**
   c. **Time Out**

HOW TO CLOCK OUT (STOP) – PART 2

OPTION 1 – SIGN, SUBMIT, <u>AND</u> RESPONSIBLE PARTY APPROVES

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

1. Select **Sign and Submit**

2. 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

3. Select the **Get Responsible Party Signature**

4. (If applicable) Select the Responsible Party's name from the drop-down menu

a. Select the **Responsible Party** that is present
b. Select **OK**

c. Select **Submit**

5. Hand your device to the responsible party

6. 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

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

8. Select the **Submit Time Entry** button.

9. Select **Ok** in the **Thank you! Your Signature was accepted, and your visit details have been submitted for processing** box to move forward

OPTION 2 – SIGN AND SUBMIT TO RESPONSIBLE PARTY FOR APPROVAL
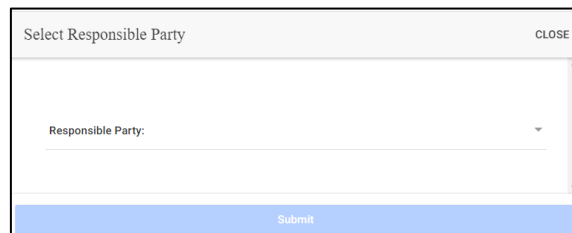
1. Select the **Sign and Submit**

2. 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
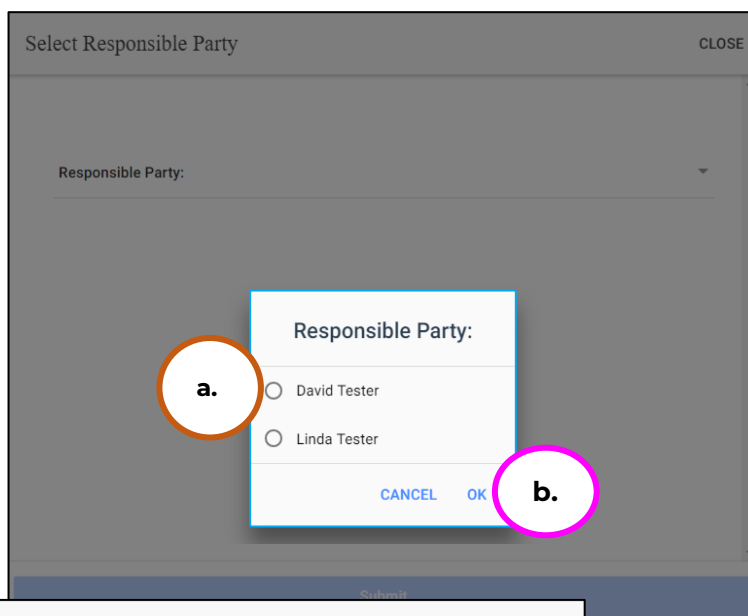

3. Select the **Submit Time Entry** button.

4. Select **OK** in the **Thank you! Your Signature was accepted, and your visit details have been submitted for processing** box to move forward
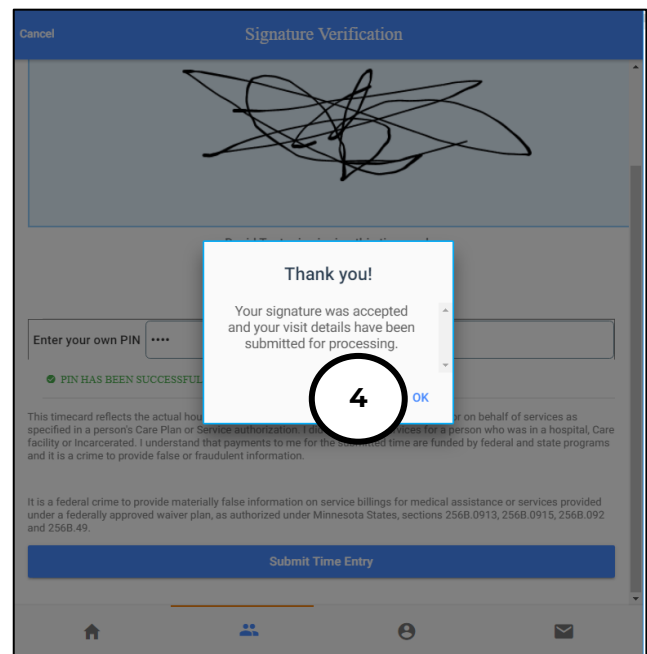
Repeat ALL steps when working MULTIPLE shifts on the SAME day

HOW TO EDIT REJECTED TIME ENTRIES

What is a rejected timecard? A rejected timecard occurs after a timecard has been submitted for approval to the Responsible Party. The Responsible Party will review if the timecard is accurate. If it is NOT, they can REJECT the timecard so that corrections can be made.

It is important to pay attention to any "Incomplete Timesheets" notifications identified on the Home screen. This message will ONLY appear if there are timesheets that need your attention, as they could be rejected. However, there is still an opportunity to make corrections and resubmit for approval.

1. On the **Home** Screen select the **View** in the **Incomplete Timesheets** box.

2. On the **Missing Visits & Timesheets** screen, select the **Complete it now** text located in the lower left corner for the specific record labelled **Incomplete visit record (Rejected by Client/RP)**.

3. Locate the **Rejected Notes** to identify what needs to be corrected.

Note: You may need to scroll down on your device to locate ALL the details to review.

4. The following information can be corrected:
   a. **Time In**
   b. **Time Out**

Reference HOW TO EDIT INCOMPLETE TIME ENTERIES (Temporarily Allowed) Steps 4-10 for assistance in adjusting the time and date if needed.

   c. **Notes**

5. Once the adjustments have been made, reference <u>HOW TO CLOCK OUT – PART 2</u> for next steps.
6. If there are any other notes requesting a correction that is not listed above submit an email ticket to our technical team at <u>CasheSupport@lifeworks.org</u> to have the rejected record removed
   a. Include the following:
      i. Your Name
      ii. Name of the Participant
      iii. Time In & Time Out of Entry
      iv. Note that the record should be deleted

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. On the **Home** Screen select **View** in the **Incomplete Timesheets** box.

2. On the **Missing Visits & Timesheets** screen, select the **Complete it now** text located in the lower left corner for the specific Incomplete visit record.

Note: You may need to scroll down on your device to locate ALL the details to review.

3. Optional: In the **Notes** section, type details about visit that you would like to share with the Responsible Party if any.

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4. In the **Service Time** section, on the upper right side select **Edit Time**.

Cancel	Complete Visit	
SERVICE TIME		Edit Time
Time in		April 14, 2022 3:07 PM
Time out		April 14, 2022 3:16 PM

SERVICE LOCATION

📍 867 Jesse's Grl Rd , 55044, ,New Market,MN

LOCATION VERIFICATION

✓ LOCATION VERIFIED BY GPS

✓ LOCATION VERIFIED BY GPS

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.

Sign and Submit

5. To adjust the **Time In**; click on the **Time In numbers**

Cancel	Complete Visit
Time In	
2022-04-14 03:07 pm	
Time Out	
2022-04-14 03:16 pm	

CANCEL   SAVE

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6. A new window opens with Year Month Day Hour Minute. Select the number that needs adjusted. Select **Done**

7. To adjust the **Time Out**; click on the **Time Out numbers**

8. A new window opens with Year Month Day Hour Minute. Select the number that needs adjusted. Select **Done**

9. Once you have successfully adjusted the time, Select **Save**

10. Select **OK** in the **Changes Updated** box to move forward

11. Double check the time was saved correctly. Once completed, select on the **Sign and Submit** button.

12. 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

13. Select the **Submit Time Entry** button.

14. Select **OK** in the **Thank you! Your Signature was accepted, and your visit details have been submitted for processing** box to move forward

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 Cashé FMS EVV.

1. Select **Care Recipients**, the 2nd icon located at the bottom
2. Directly under the Participants name, select **Start Visit** to clock in

3. In the **Select Job** box, select the service you will provide
4. Select **OK** in the lower right corner.

5. Immediately select the **Stop** button.

6. In the **Do you want to end this visit** box, select the **YES** text displayed in the lower right corner.

Note: You may need to scroll down on your device to locate ALL the details to review.

7. Optional: In the **Notes** section, type details about the visit that you would like to share with the responsible party or participant.

8. In the **Service Time** section, on the right side select **Edit Time**.

9. To adjust the **Time In**; select the **Time In numbers**. A new window opens with Year Month Day Hour Minute AM/PM.

10. Adjust the number or numbers that need to be changed.

11. Select the **Done** in the upper right corner of the box

12. To adjust the **Time Out**; select the **Time Out numbers**. A new window opens with Year Month Day Hour Minute AM/PM.

13. Adjust the number or numbers that need to be changed.

14. Select **Done** in the upper right corner of the box

15. Confirm the information was updated.

   NOTE: To make corrections to the visit, refer to Steps 9-15 on how to make edits

16. Select **Save**

17. Select **OK** in the **Changes Updated** box to move forward

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18. Review the Time Details again to confirm they saved correctly
19. Select **Sign and Submit**

20. 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

21. Select the **Submit Time Entry** button.

    NOTE: A Responsible Party CAN use their PIN to approve this time entry. Before continuing with Step 21, reference *Option 1: Sign, Submit, __AND__ Responsible Party Approves* for the correct steps.

22. Select **OK** in the **Thank you! Your Signature was accepted, and your visit details have been submitted for processing** box to move forward
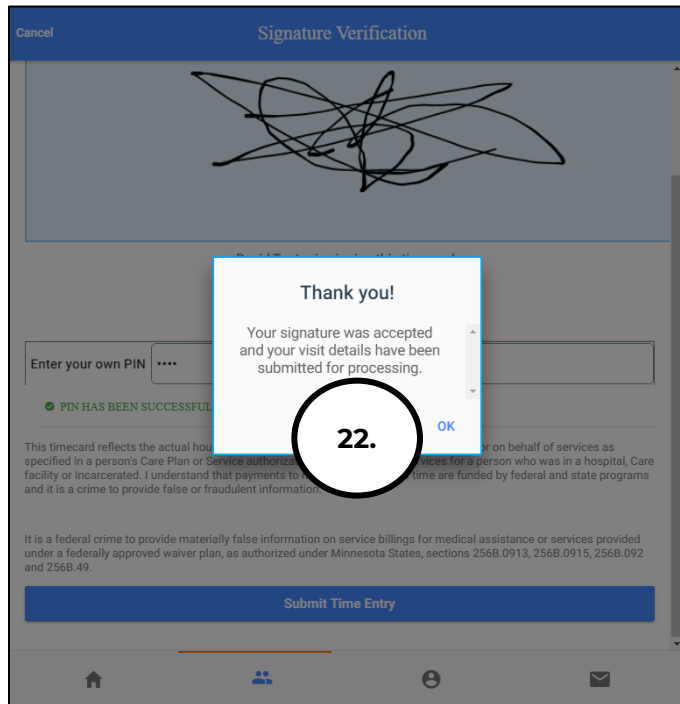
23. Repeat steps 2-22 until ALL time has been entered.

HOW TO USE CASHÉ FMS EVV: Shared Services

HOW TO CLOCK IN (START VISIT)

1. Select **Care Recipients**, the 2nd icon located at the bottom
2. Directly under the Participant's name, select **Start Visit** to clock in at the beginning of your shift
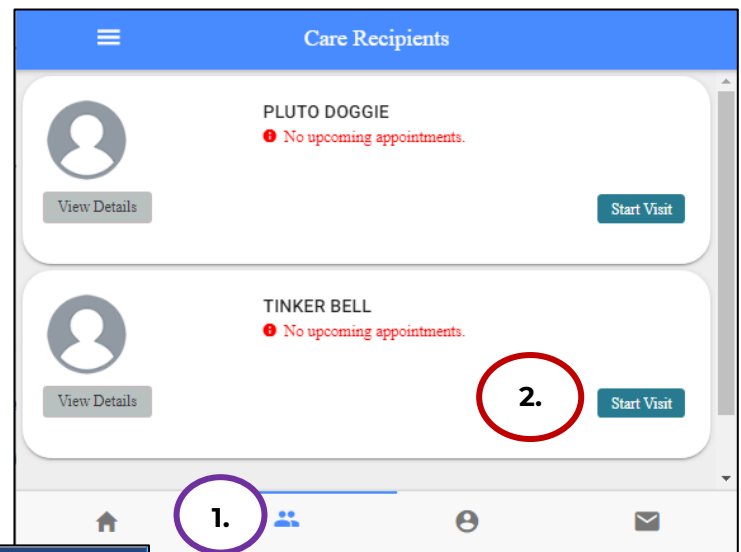
3. In the **Select Job** box, select the service you will provide
4. Select **OK** in the lower right corner.
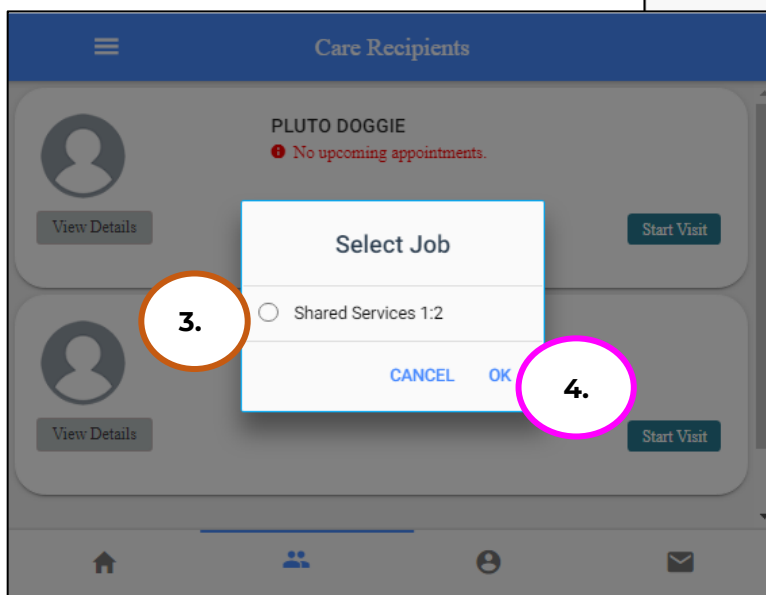
5. Repeat Steps 1-4 for the **2ⁿᵈ Participant** you will be working with
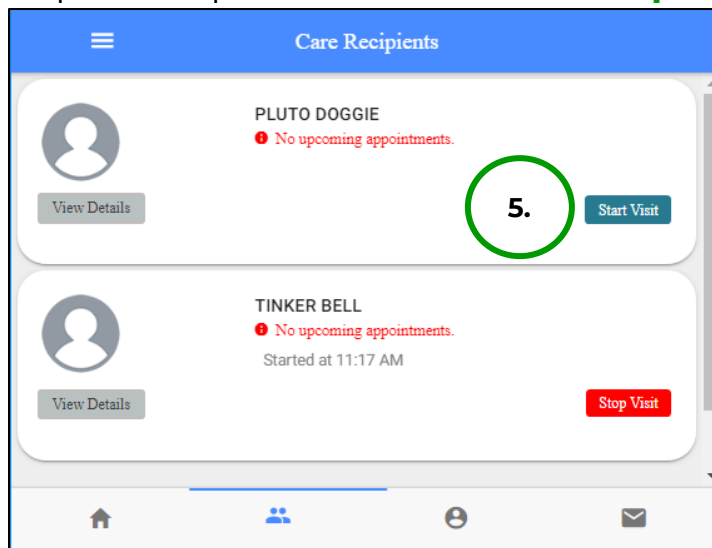
6. Start your shift with the participants.

HOW TO CLOCK OUT (STOP)

**NOTE: To AVOID DELAYS in PAYROLL processing, it is CRUCIAL that the details for the Shared Service time entry match for each participant.

OPTION 1 – CLOCK OUT, SIGN, AND SUBMIT TO RESPONSIBLE PARTY FOR APPROVAL

*Use this method if the Responsible Party is <u>NOT</u> present at the end of your shift while clocking out.

1. Select **Care Recipients**, the 2nd icon located at the bottom
2. Select the **Stop** button to end your shift with the first participant

3. In the **Do you want to end this visit** box, select the **YES** text displayed in the lower right corner.

4. Select **Cancel** in the upper right corner

Cancel	Complete Visit

Recipient of care
Elephant Pun

SERVICE DETAIL

Service type   Shared Services 1:2

ACTIVITIES

☑ Shared Services 1:2

NOTES

Enter notes

SERVICE TIME   Edit Time

Time in   April 15, 2022 1:00 PM

Sign and Submit

5. Repeat Steps 1-3 for the **2nd participant**

☰	Care Recipients

PLUTO DOGGIE
❶ No upcoming appointments.
Started at 11:20 AM

View Details   **Stop Visit**

TINKER BELL
❶ No upcoming appointments.
✓ Duration min

View Details   Start Visit

Note: You may need to scroll down on your device to locate ALL the details to review.

6. Review the following:
    a. **Service Type** = "Shared Services"
    b. **Notes**: (this is an optional field) type any details about the visit that you would like to share with the responsible party or participant
    c. **Time In**
    d. **Time Out**

7. Select the **Sign and Submit** button.

8. 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

9. Select the **Submit Time Entry** button.

10. Select **OK** in the **Thank you! Your Signature was accepted, and your visit details have been submitted for processing** box to move forward

11. Repeat ALL Steps for the **2nd participant**
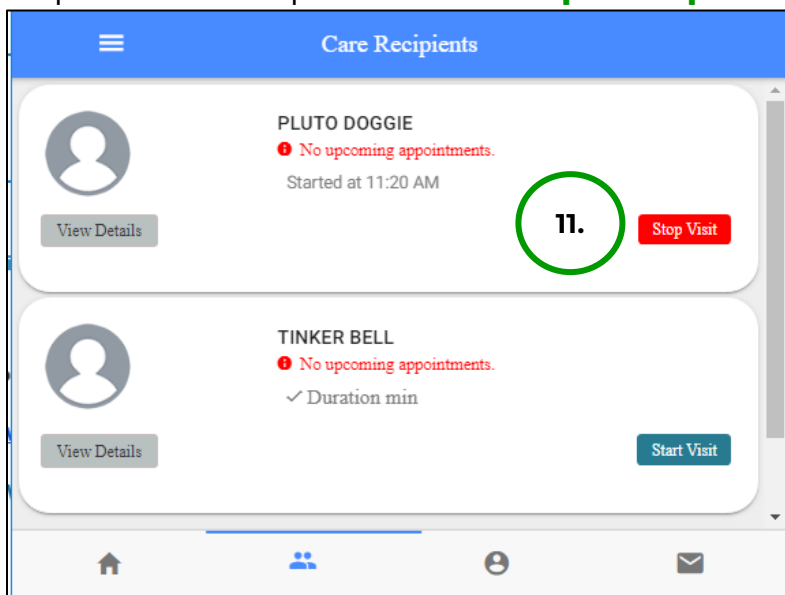
Repeat ALL steps when working MULTIPLE shifts on the SAME day

OPTION 2 – CLOCK OUT, SIGN, SUBMIT, <u>AND</u> RESPONSIBLE PARTY APPROVES

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

1. Select **Care Recipients**, the 2nd icon located at the bottom
2. Select the **Stop** button for the 1st participant you supported.
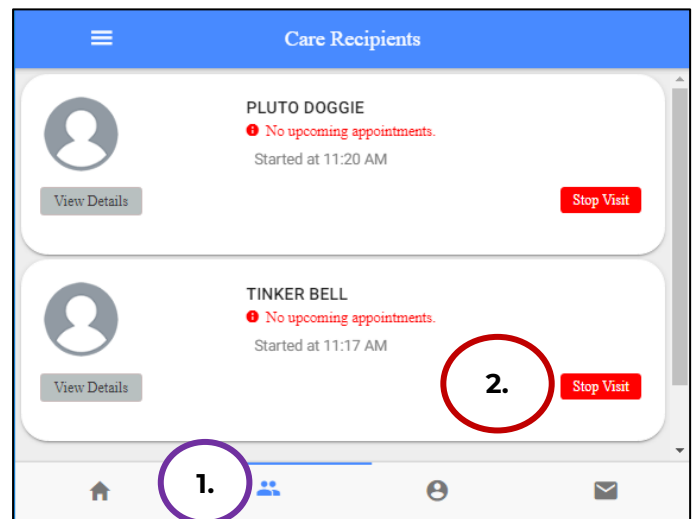
3. In the **Do you want to end this visit** box, select the **YES** text displayed in the lower right corner.

4. Select **Cancel** in the upper right corner

Cancel **4.** Complete Visit

Recipient of care
Elephant Pun

SERVICE DETAIL

Service type   Shared Services 1:2

ACTIVITIES

☑ Shared Services 1:2

NOTES

Enter notes

SERVICE TIME   Edit Time

Time in   April 15, 2022 1:00 PM

Sign and Submit
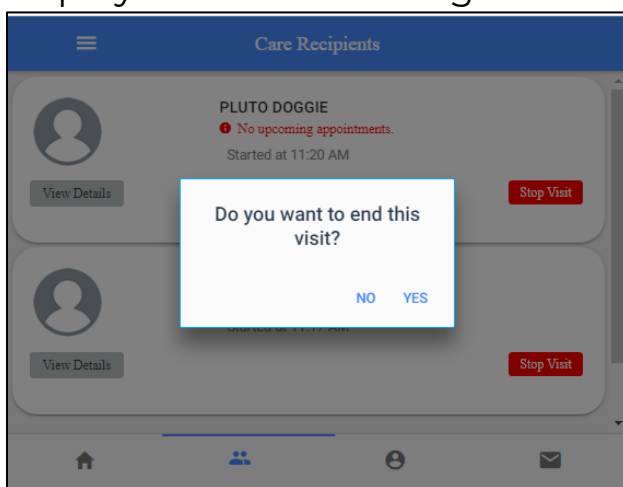
5. Repeat Steps 2-4 for the **2nd participant**

Care Recipients

PLUTO DOGGIE
❶ No upcoming appointments.
Started at 11:20 AM

View Details   **5.**   Stop Visit

TINKER BELL
❶ No upcoming appointments.
✓ Duration min

View Details   Start Visit

6. Select the **Home**, the 1st icon located at the bottom of the screen
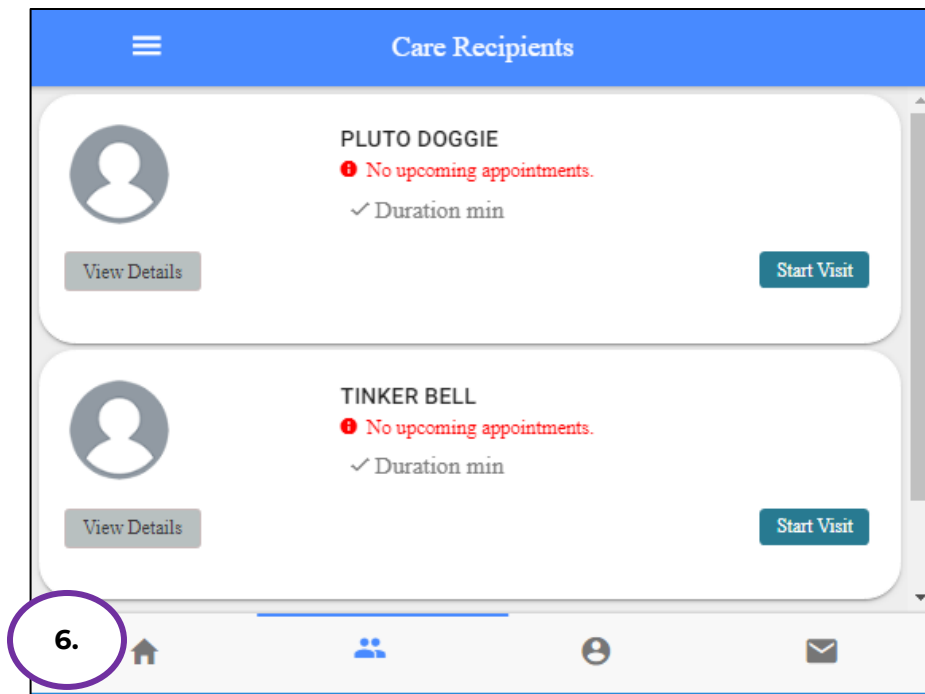
7. Select the **View** in the lower right corner of the **Incomplete Timesheets** box.
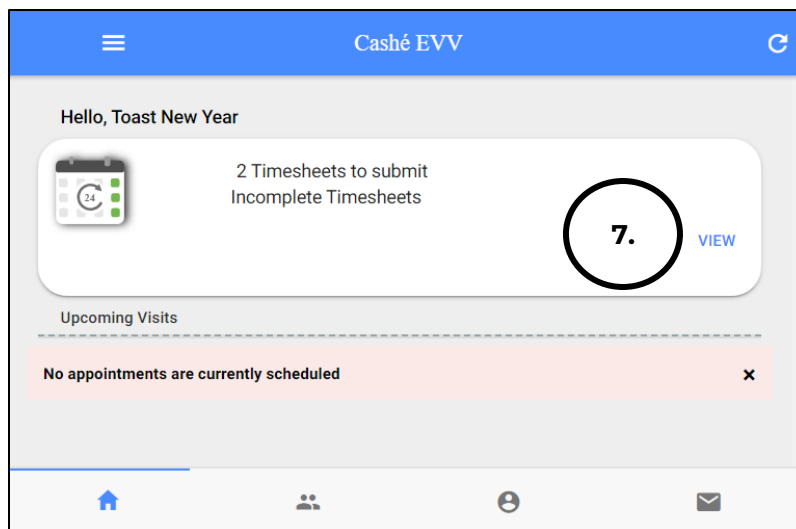
8. On the **Missing Visits & Timesheets** screen select the **Complete it now** text located in the lower left corner for the specific Incomplete visit record.
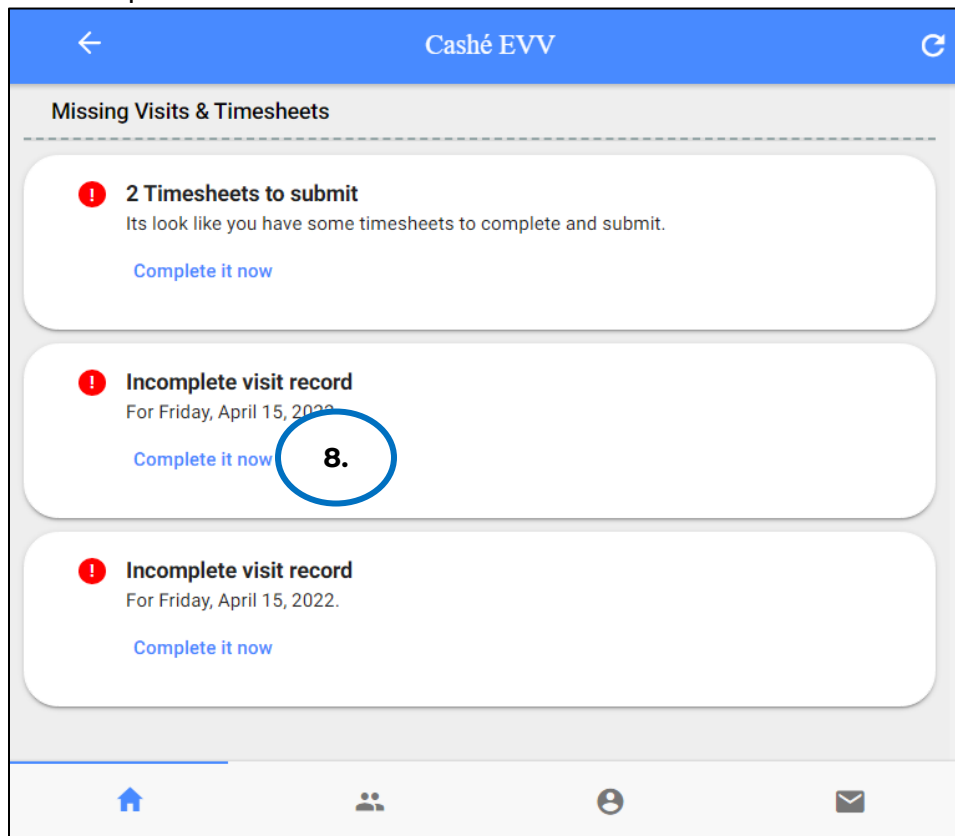
Note: You may need to scroll down on your device to locate ALL the details to review.

9. Review the following:
   a. **Service Type** = "Shared Services"

b. **Notes**: (this is an optional field) type any details about the visit that you would like to share with the responsible party or participant

c. **Time In**

d. **Time Out**

10. Select **Sign and Submit**

Cancel	Complete Visit

Enter notes

SERVICE TIME	Edit Time
Time in	April 15, 2022 1:00 PM
Time out	April 15, 2022 2:00 PM

SERVICE LOCATION

📍 10 Lasso Truth Trail, 55374, ,Rogers,MN

LOCATION VERIFICATION

✅ LOCATION VERIFIED BY GPS

✅ LOCATION VERIFIED BY GPS

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.

10. **Sign and Submit**

11. 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

12. Select the **Get Responsible Party Signature** button

Cancel	Signature Verification

11.

Sign your name using your
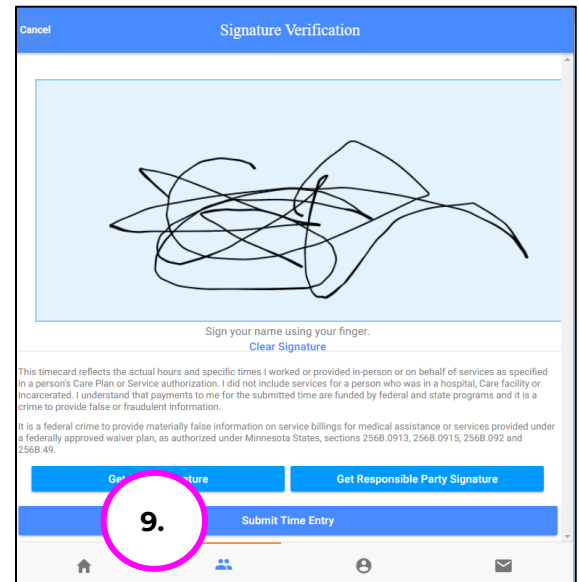**Clear Signature**   **Note**

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.
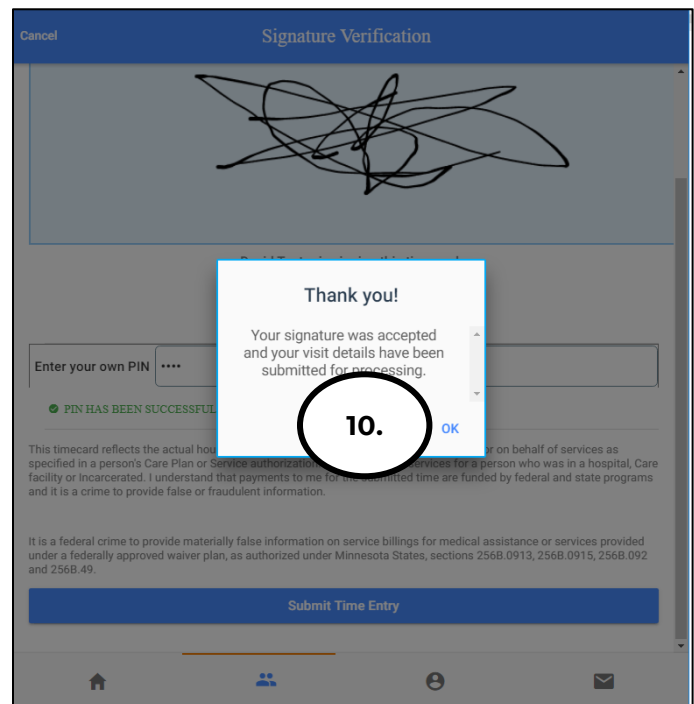
Get Client Signature	**12.** Responsible Party Signature

Submit

13. (If applicable) Select the Responsible Party's name from the drop-down menu

Select Responsible Party   CLOSE

Responsible Party:

Submit

a. Select the **Responsible Party** that is present
b. Select **OK**

Select Responsible Party   CLOSE

Responsible Party:

Responsible Party:

a.   ○ David Tester

     ○ Linda Tester

              CANCEL   OK   b.

Submit

c. Select **Submit**

Select Responsible Party   CLOSE

Responsible Party: David Tester ▾

Submit

14. Hand your device to the Responsible Party

15. 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

16. The Responsible Party enters their **4-digit PIN**

17. Select the **Submit Time Entry** button.

18. Select **Ok** in the **Thank you! Your Signature was accepted, and your visit details have been submitted for processing** box to move forward
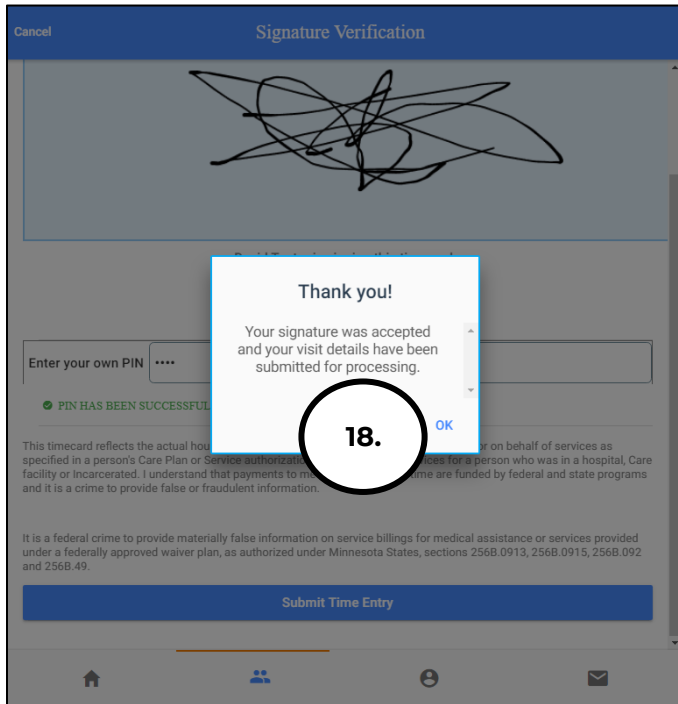
19. Repeat Steps 8-18 for the 2nd participant

HOW TO EDIT REJECTED TIME ENTRIES

What is a rejected timecard? A rejected timecard occurs after a timecard has been submitted for approval to the Responsible Party. The Responsible Party will review if the timecard is accurate. If it is NOT, they can REJECT the timecard so that corrections can be made.

It is important to pay attention to any "Incomplete Timesheets" notifications identified on the Home screen. This message will ONLY appear if there are timesheets that need your attention, as they could be rejected. However, there is still an opportunity to make corrections and resubmit for approval.

1. On the **Home** Screen select the **View** in the **Incomplete Timesheets** box.

2. On the **Missing Visits & Timesheets** screen, select the **Complete it now** text located in the lower left corner for the <u>specific</u> record labelled **Incomplete visit record (Rejected by Client/RP)**.
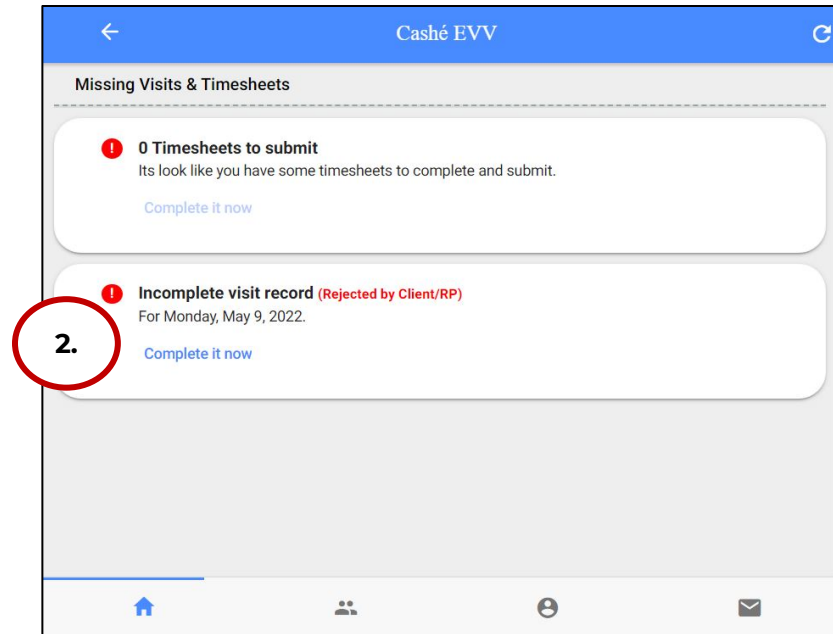
3. Locate the **Rejected Notes** to identify what needs to be corrected.

Note: You may need to scroll down on your device to locate ALL the details to review.

4. The following information can be corrected:
   a. **Time In**
   b. **Time Out**

Reference [HOW TO EDIT INCOMPLETE TIME E NTERIES (Temporarily Allowed)](#) for assistance in adjusting the time and date if needed.

   c. **Notes**

5. Once the adjustments have been made, reference [HOW TO CLOCK OUT – PART 2](#) for next steps.

6. If there are any other notes requesting a correction that is not listed above submit an email ticket to our technical team at CasheSupport@lifeworks.org to have the rejected record removed
    a. Include the following:
        i. Your Name
        ii. Name of the Participant
        iii. Time In & Time Out of Entry
        iv. Note that the record should be deleted

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HOW TO EDIT INCOMPLETE TIME ENTRIES (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.*

1. On the **Home** Screen select the **View** in the **Incomplete Timesheets** box.

2. On the **Missing Visits & Timesheets** screen, select the **Complete it now** text located in the lower left corner for the specific Incomplete visit record.

Note: You may need to scroll down on your device to locate ALL the details to review.

3. Optional: In the **Notes** section, type details about visit that you would like to share with the Responsible Party if any.

4. In the **Service Time** section, on the upper right side select **Edit Time**.

5. To adjust the **Time In**; click on the **Time In numbers**

6. A new window opens with Year Month Day Hour Minute. Select the number that needs adjusted. Select **Done**

7. To adjust the **Time Out**; click on the **Time Out numbers**

Cancel	**Complete Visit**

Time In

2022-02-12 01:00 am

Time Out

2022-04-14 03:16 pm **7.**

CANCEL   SAVE

8. A new window opens with Year Month Day Hour Minute. Select the number that needs adjusted. Select **Done**

Cancel	**Complete Visit**

Time In

2022-02-12 01:00 am

Time Out

2022-04-14 03:16 pm **8.**

CANCEL   DONE

	02	12	01	14	
	03	13	02	15	am
2022	04	14	03	16	pm
2021	05	15	04	17	
2020	06	16	05	18	

9. Once you have successfully adjusted the time, Select **Save**

10. Select **OK** in the **Changes Updated** box to move forward

11. Double check the time was saved correctly. Once completed, select on the **Sign and Submit** button.

12. 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

13. Select the **Submit Time Entry** button.

14. Select **OK** in the **Thank Your Signature was accepted, and your visit details have been submitted for processing** box to move forward

you!
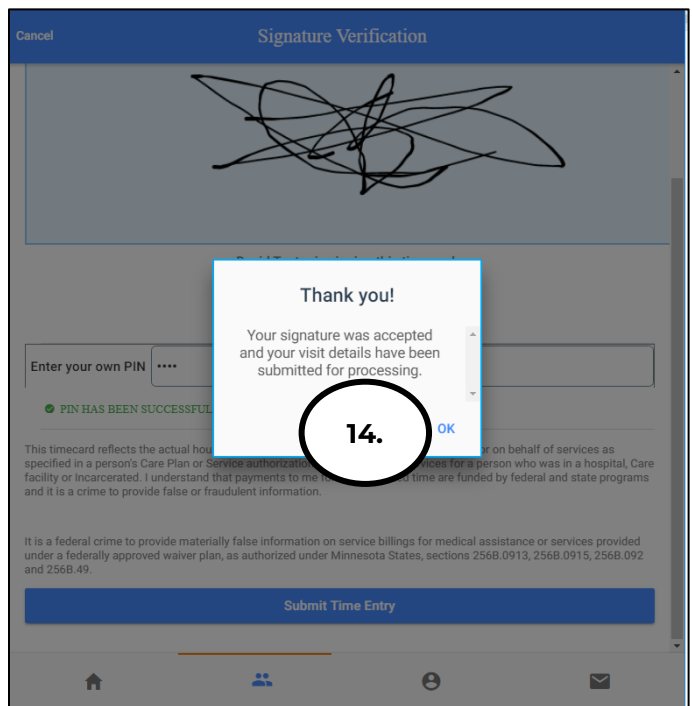
15. Repeat Steps 2-14 for ALL Shared Services Time Entry's that need adjusted as they should match for each Participant

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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 Cashé FMS EVV.

1. Select **Care Recipients**, the 2nd icon located at the bottom
2. Directly under the 1st Participant's name, select **Start Visit** to clock in

3. In the **Select Job** box, select the service you will provide
4. Select **OK** in the lower right corner.

5. Immediately select the **Stop** button.

6. In the **Do you want to end this visit** box, select the **YES** text displayed in the lower right corner.

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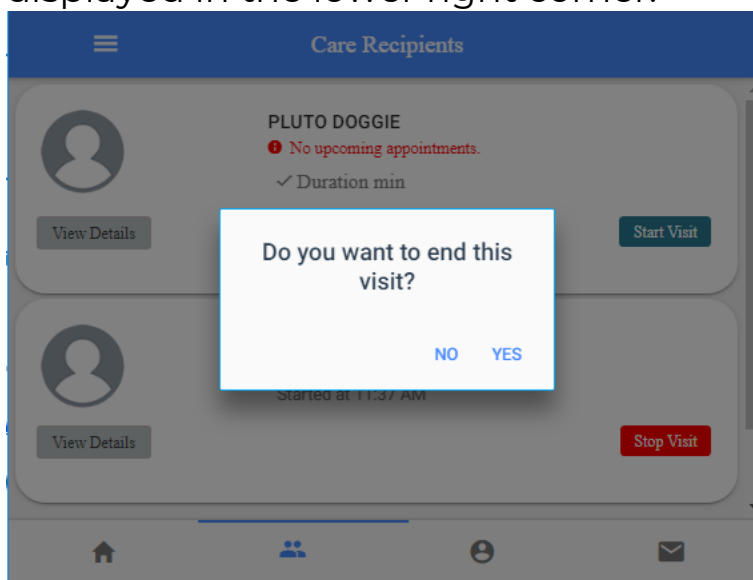
Note: You may need to scroll down on your device to locate ALL the details to review.

7. In the **Service Time** section, on the upper right side select **Edit Time**.

8. To adjust the **Time In**; select the **Time In numbers**. A new window opens with Year Month Day Hour Minute AM/PM.

9. Adjust the number or numbers that need to be changed.

10. Select the **Done** in the upper right corner of the box

Time In					
2022-04-14 03:07 pm					
Time Out					
2022-04-14 03:16 pm					

CANCEL | | | DONE |
02	12	01	05	
03	13	02	06	am
2022	04	14	03	07	pm
2021	05	15	04	08	
2020	06	16	05	09	

10.

11. To adjust the **Time Out**; select the **Time Out numbers**. A new window opens with Year Month Day Hour Minute AM/PM.

Complete Visit

Time In
2022-02-12 01:00 am

Time Out
2022-04-14 03:16 pm

11.

CANCEL | SAVE

12. Adjust the number or numbers that need to be changed.
13. Select **Done** in the upper right corner of the box

14. Confirm the information was updated.

> NOTE: To make corrections to the visit, refer to Steps 9-15 on how to make edits

15. Select **Save**

16. Select **OK** in the **Changes Updated** box to move forward

17. Review the Time Details again
to confirm they saved correctly,
then select **Cancel**

18. Repeat Steps 2-17 for the **2nd participant**
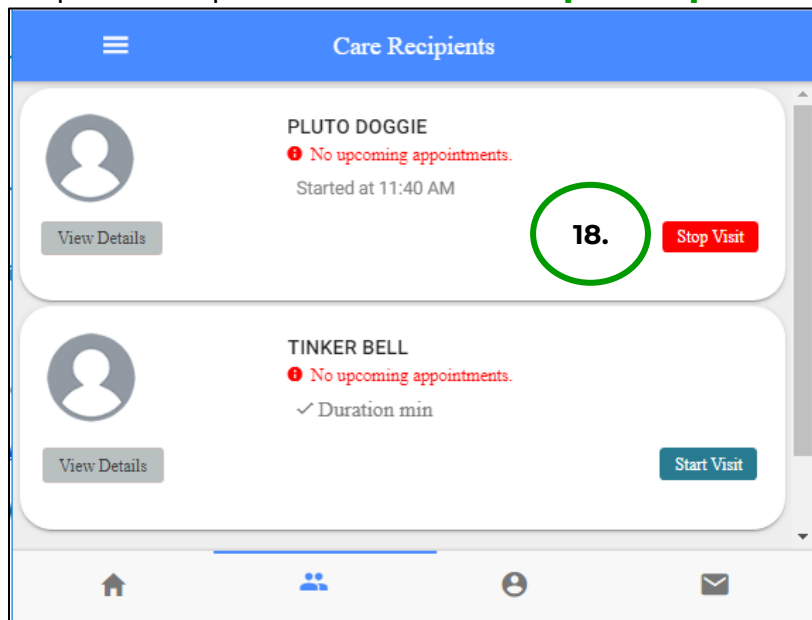
19. Select the **Home**, the 1st icon located at the bottom of the screen
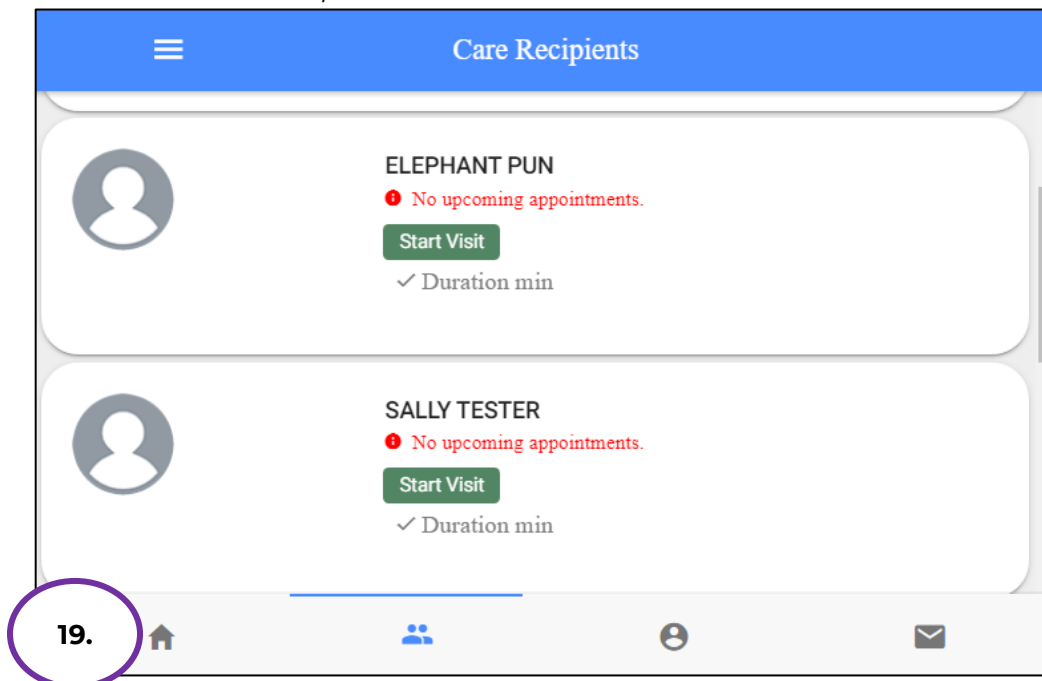
20. Select the **View** in the lower right corner of the **Incomplete Timesheets** box.
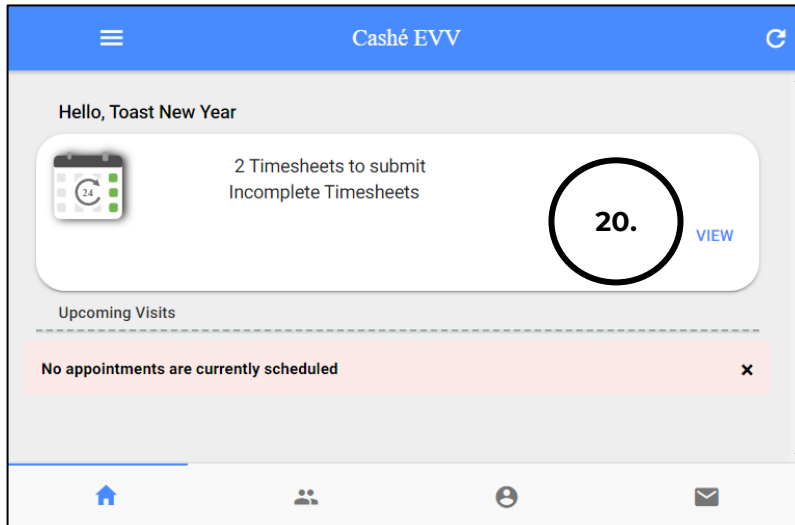
21. On the **Missing Visits & Timesheets** screen select the **Complete it now** text located in the lower left corner for the <u>specific Incomplete visit</u> record.
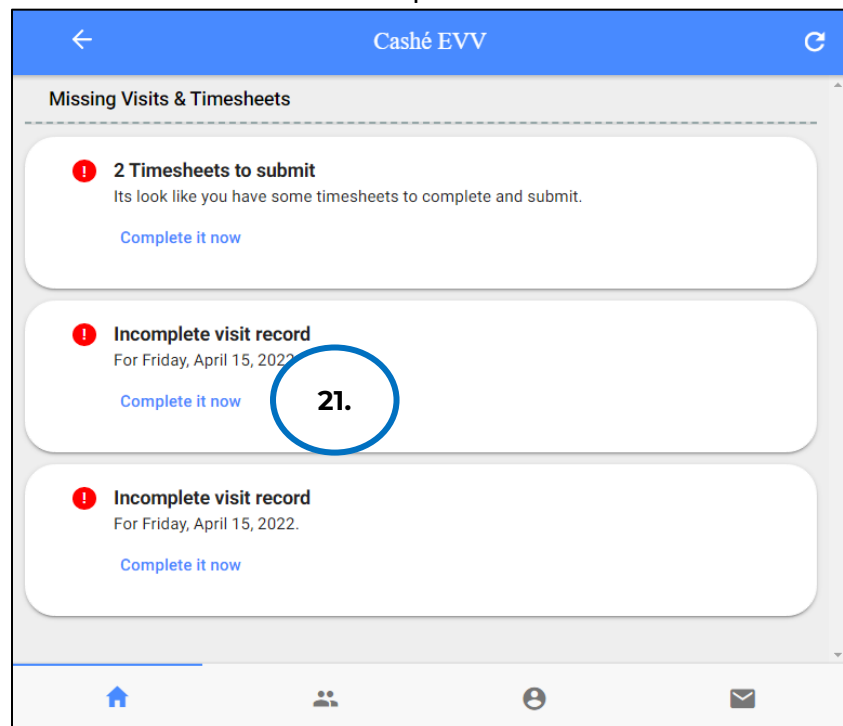
Note: You may need to scroll down on your device to locate ALL the details to review.

22. Review the following:
1. **Service Type** = "Shared Services"
2. **Notes**: (this is an optional field) type any details about the visit that you would like to share with the responsible party or participant
3. **Time In**
4. **Time Out**

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23. Select **Sign and Submit**

Cancel	Complete Visit	

Enter notes

SERVICE TIME .... Edit Time

Time in .... April 15, 2022 1:00 PM

Time out .... April 15, 2022 2:00 PM

SERVICE LOCATION

📍 10 Lasso Truth Trail, 55374, ,Rogers,MN

LOCATION VERIFICATION

✓ LOCATION VERIFIED BY GPS

✓ LOCATION VERIFIED BY GPS

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.

23. | **Sign and Submit**

🏠 👥 👤 ✉

Reference
[OPTION 1 – CLOCK OUT, SIGN, AND SUBMIT TO RESPONSIBLE PARTY FOR APPROVE](#)
or
[OPTION 2 – CLOCK OUT, SIGN, AND RESPONSIBLE PARTY APPROVES](#)
for next steps

24. Repeat Steps 22-23 for the 2nd participant

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ADDITIONAL FEATURES OF CASHÉ FMS EVV
HOW TO CHANGE YOUR PREFERRED LANGUAGE

1. Select the **Menu** Icon in the upper left corner of the **Home** Screen
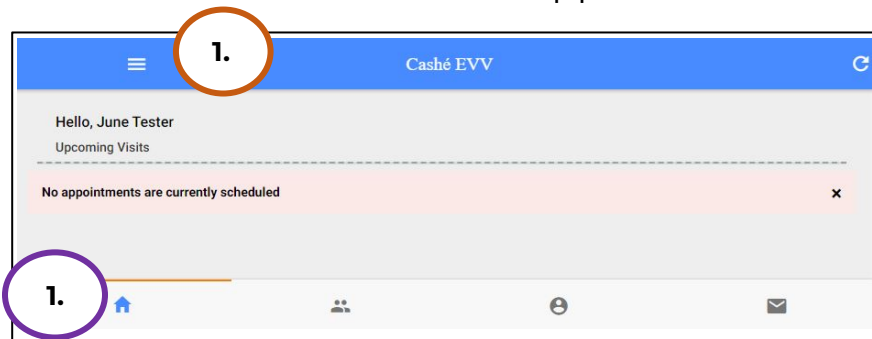
2. Select the first option **Language**
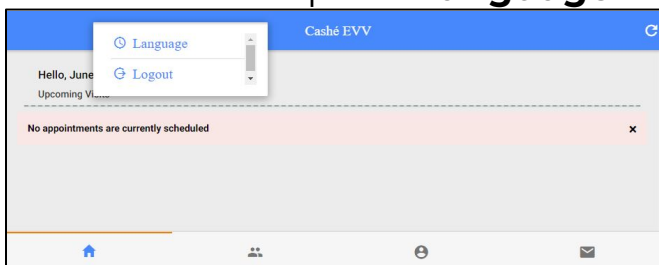
3. Select your preferred language
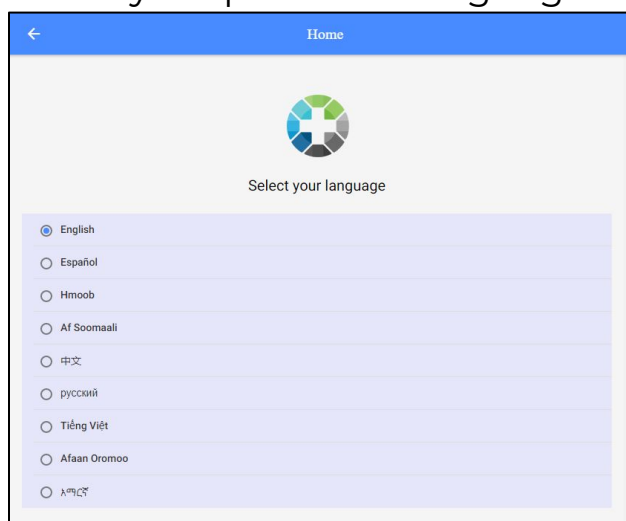
4. A confirmation message, **Language setting has been applied successfully** will appear

5. Select **OK**
6. Select the **back arrow** in the upper left corner of the screen to return to the Home Screen

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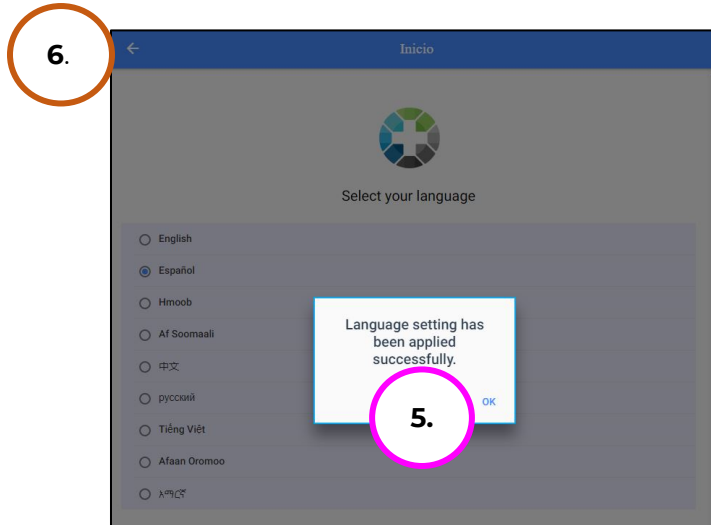
HOW TO REVIEW SUBMITTED TIME ENTRIES

1. Select **Care Recipients**, the 2nd icon located at the bottom
2. Select the **View Details** button on the right.
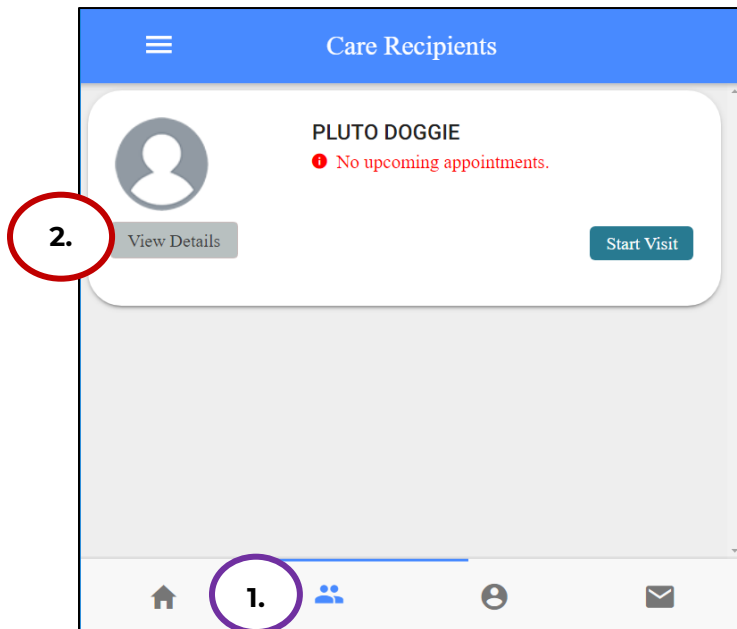
3. Select **Time Entries**
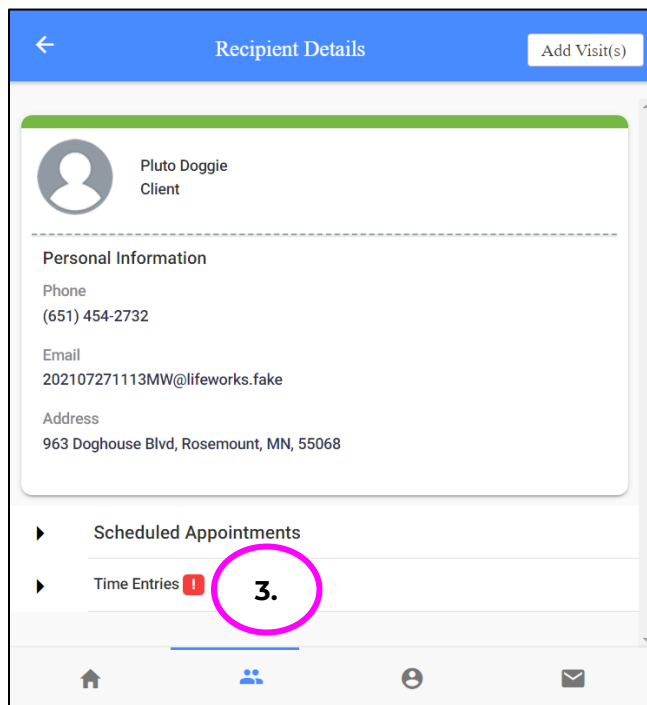
4. Select the **Month** you would like to review
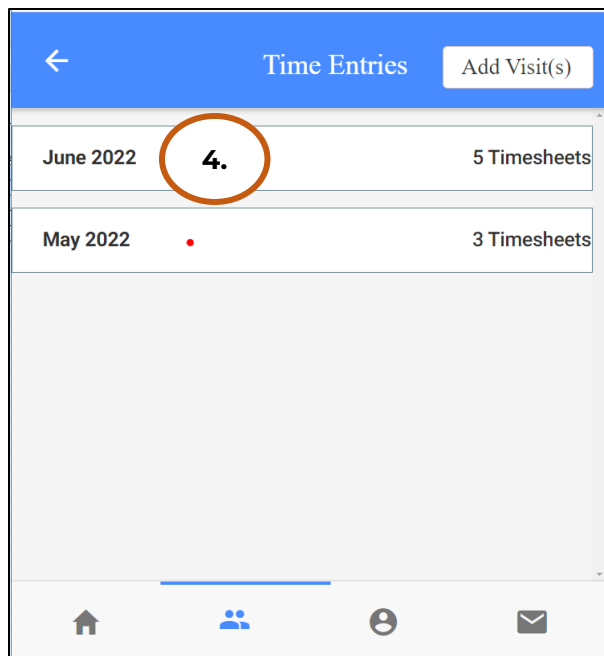
5. Select the **Day** you would like to review
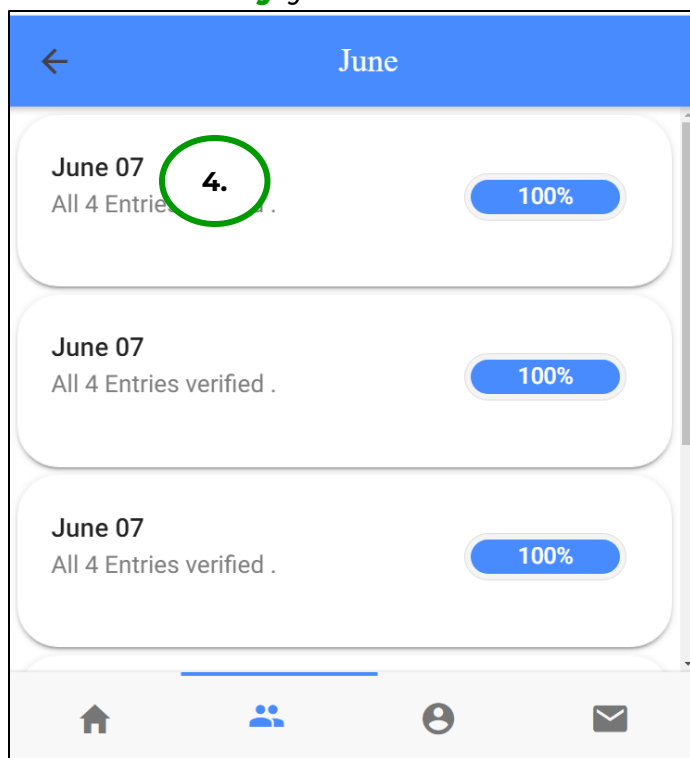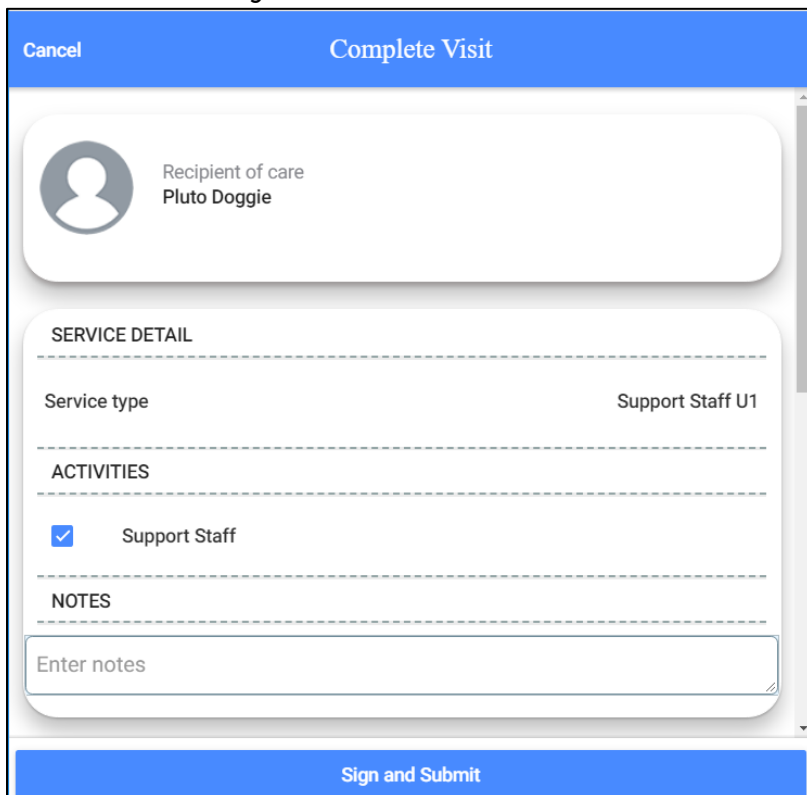
6. Review the details of the Time Entry
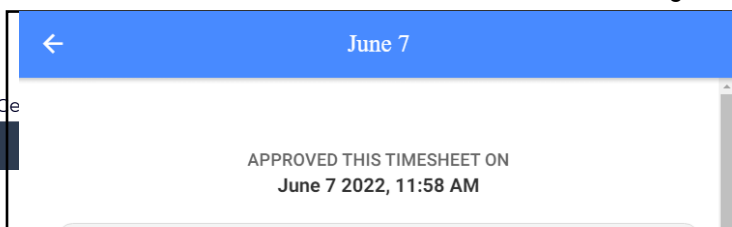
7. If you find have not submitted the Time Entry, Sign and Submit the time entry at this time

8. If you find you HAVE submitted the time entry & it is incorrect reach out to your Responsible Party or Reference the Employee User Guide Commonly Asked Questions for next steps

HOW TO REVIEW TOTAL WEEKLY HOURS WORKED

1. Select **My Profile**, the 3rd icon on the bottom of the screen
2. Scroll down until you see **Hours Worked**
    a. This will show ONLY the total hours for the current week. The hours will reset every Saturday at 11:59 pm.
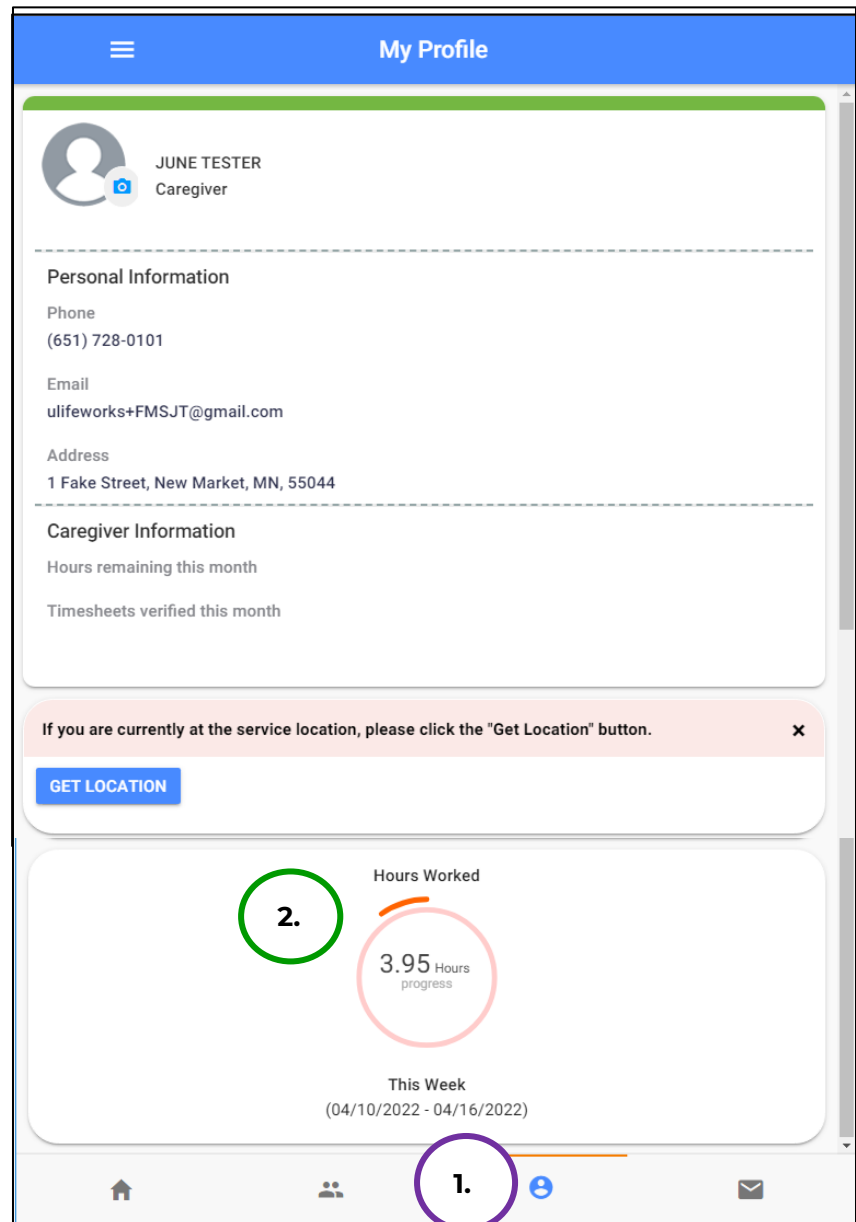
COMMONLY ASKED QUESTIONS
MISSING LOGIN INFORMATION

1. An email was sent from admin@cashesoftware.com; be sure to search your junk/spam, Promotions tab (Gmail accounts) AND Inbox folders for the information. You can refer to How to Log In and Set Up Your Password for an example of the email.
2. If you cannot find the original email, please send an email ticket to our technical team at CasheSupport@lifeworks.org to request new login information to be sent.
   Include the following information:

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

CANNOT LOG IN

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

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 Cashé FMS 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.

HOW TO SWITCH FROM CAREGIVER TO RESPONSIBLE PARTY

To switch roles, you will need to Log Out of the Cashé FMS EVV app and Log back in. Then select the Responsible Party role.
To Log out:

1. Select **Menu**
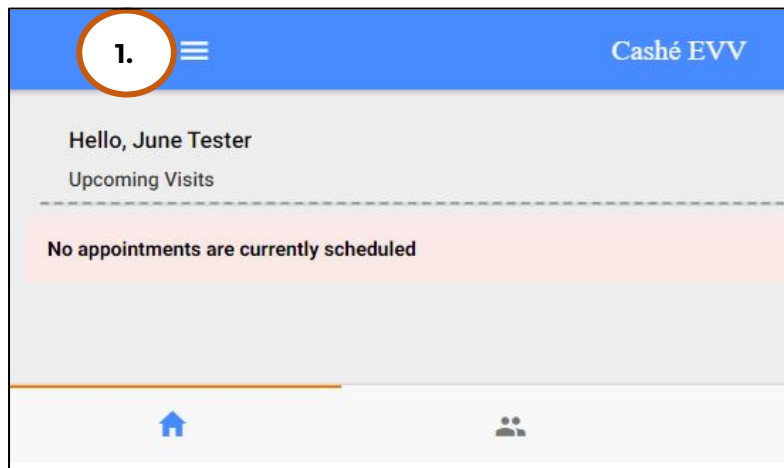
2. Select **Logout**
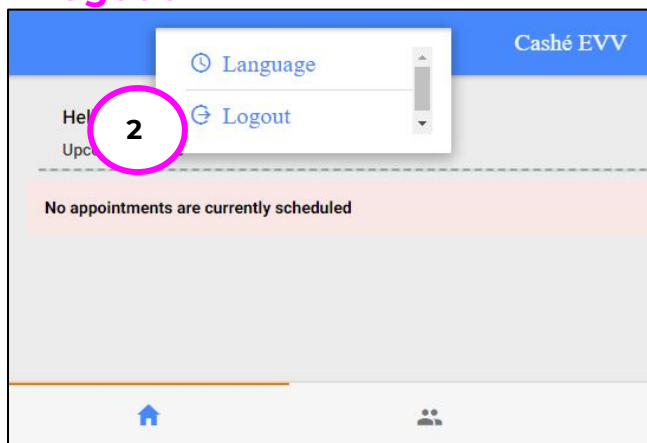
LANGUAGE PREFERENCE NOT UPDATING

1. The **Change Language** function should immediately update all fields with your preferred language. If that is not the case, log out of Cashé FMS EVV by selecting the menu icon in the upper left corner of the screen and Log Out. Then, log back into Cashé FMS EVV. The language should be updated with the preferred language.

2. If your preferred language still has not updated, please submit an email ticket to our technical team at CasheSupport@lifeworks.org. Include the following information:

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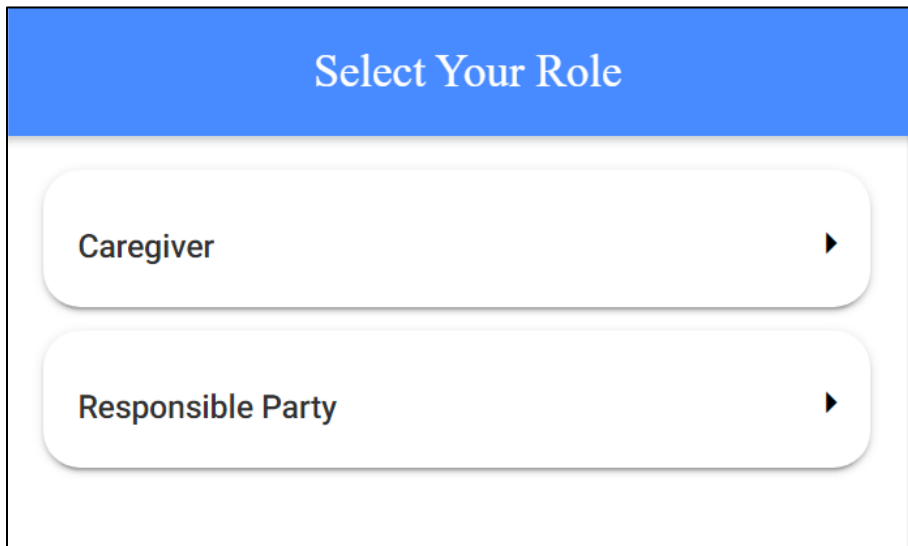   o If a phone call is preferred, please specify best the Date & Time for a returned call.

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

DO I NEED CASHE FMS EVV APP OPEN ALL DAY?

You do NOT need to keep the Cashé FMS EVV app open during your shift.

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

The next time Cashé FMS EVV needs to be open is when you are ready to Clock Out & submit your timecard.

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.
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 SUBMIT MULTIPLE SHIFTS IN A DAY

Repeat ALL steps when working MULTIPLE shifts on the SAME day

Reference HOW TO USE CASHÉ FMS EVV: One to One Services OR HOW TO USE CASHÉ FMS EVV: Shared Services

RESPONSIBLE PARTY REJECTED MY TIME

Please refer to <u>HOW TO EDIT REJECTED TIME ENTRIES</u> for next steps. If you have additional questions, please submit an email ticket to our technical team at <u>CasheSupport@lifeworks.org</u>.

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.

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.

WHY IS THERE A TIME LIMIT FOR SHARED SERVICES?

To make sure your Shared Services match there is a 3 minute 30 second window between both participants & entries to sign and submit the information.

If you are NOT able to submit BOTH entries within that window, submit an email ticket to our technical team at CasheSupport@lifeworks.org.

- 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.
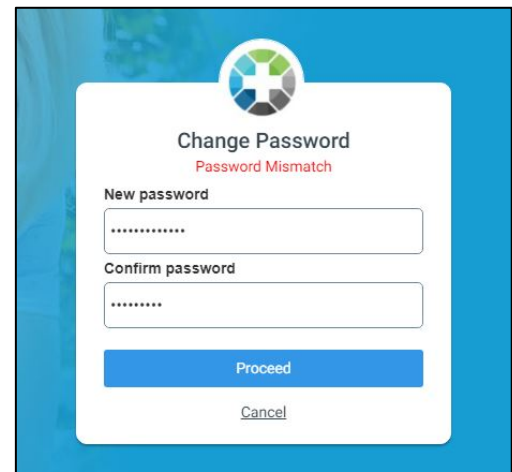
ERROR MESSAGES GUIDE

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

Password Mismatch
Reason: The password you entered in
New password does NOT match what
was entered in **Confirm Password**.
Solution: Please carefully re-type the
information. If you continue to receive
the error message, submit an email ticket
to our technical team at
CasheSupport@lifeworks.org.
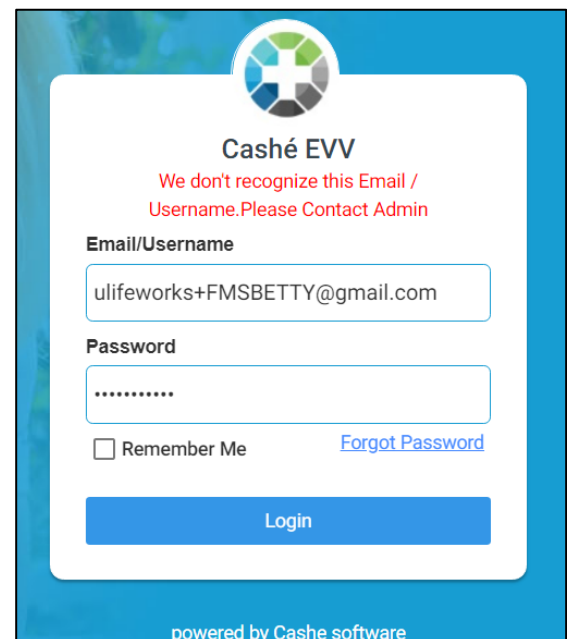
We don't recognize this Email/Username. Please Contact Admin
Reason: Your email username is
incorrect, or you have not completed
your registration with Cashé FMS EVV.
Solution:
1. Check your email for a welcome email
from Cashé FMS EVV
(admin@cashesoftware.com) and follow
the steps for setting up your information.
2. Send an email ticket to our technical
team at CasheSupport@lifeworks.org

Username or password is incorrect
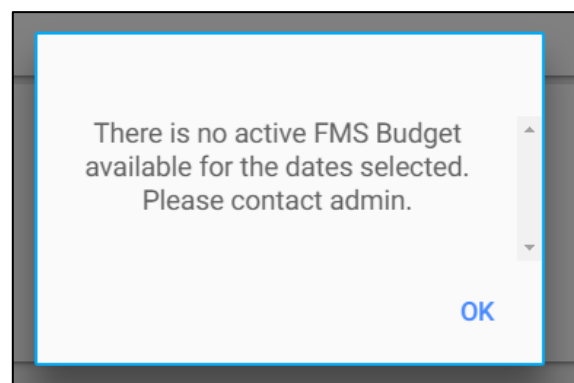
Reason: Your password or username is incorrect due to a typo or a different password was used to set up your login.

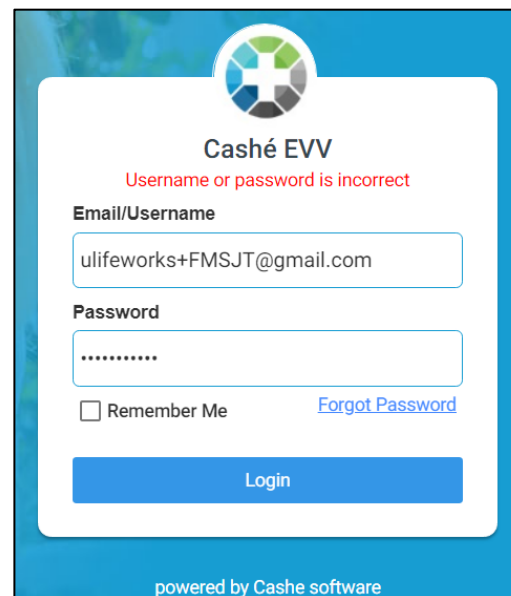**Solution:** Please carefully re-type the information. If you continue to receive the error message, select "Forgot Password" to reset your information.

There is no active FMS Budget available for the dates selected. Please contact admin.
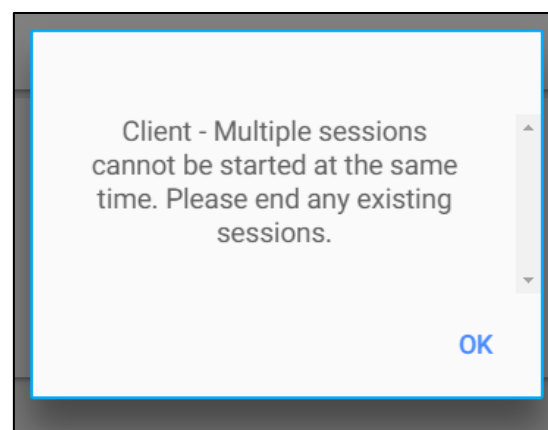
Reason: We are not able to share the reason with anyone other than the Responsible Party.

Solution: Contact your Responsible Party for more information.

Client – Multiple sessions cannot be started at the same time. Please end any existing sessions.

Reason: Another employee is currently logged in meaning they forgot to clock out from their shift, or the Responsible Party scheduled someone else with the same shift.

Solution: Contact your Responsible Party for more information.

Invalid Time. Time out is lesser than time in.

Reason: An incorrect date or time has been entered & must be reviewed before it will be accepted.

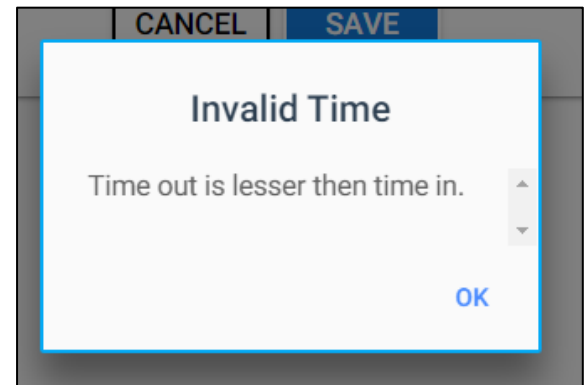**Solution:** Review the Time In and Time Out dates and times. Also, AM/PM may have not updated. Reference HOW TO EDIT INCOMPLETE TIME ENTRIES (Temporarily Allowed) for steps on how to edit the date and time.

You've entered time that overlaps with an existing timecard.

Reason: You or another employee has entered a time entry that overlaps. The entry could overlap by 1 minute or the entire shift.

Solution: Review the Time Entries you have already submitted. Reference HOW TO EDIT INCOMPLETE TIME ENTRIES (Temporarily Allowed) for steps on how to edit the date and time. If you have questions reach out to your Responsible Party or Reference the Employee User Guide Commonly Asked Questions for next steps

Multiple Users Found.

Reason: The email address provided to Lifeworks is being used by another individual or agency.

Solution: Please submit an email ticket to our technical team at CasheSupport@lifeworks.org if you need assistance.

Include the following information:
- Description of why you are reaching out
- Screenshot of error message
- Your Full Name
- Your Username
- Preferred contact method for the response

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

Other error messages

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

Include the following information:

- Description of why you are reaching out
- Screenshot of error message
- Your Full Name
- Your Username
- Name of Your 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.

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.

WHO CAN I CONTACT TO ANSWER CASHÉ FMS 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: Save a copy of this Employee User Guide to your device for future reference OR for the most recent version go to the following website https://www.lifeworks.org/timekeeping/.