

SUPPORT MANAGER USER GUIDE FOR CASHÉ FMS EVV

Fiscal Management Services (FMS)
CDCS/CSG

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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/39zkgp95>.

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 CashSupport@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 applicable)
- Description of why you are reaching out
- Your Full Name
- Your Username
- Name of Your Employee (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.

GETTING STARTED

SNAPSHOT OF NAVIGATION

Home (Default View) <i>1st Icon on the bottom of the screen</i>	
Care History <i>2nd Icon on the bottom of the screen</i>	
My Profile <i>3rd Icon on the bottom of the screen</i>	
Notifications <i>4th Icon on the bottom of the screen</i>	
Refresh <i>Upper Right Corner of the screen</i>	
Menu <i>Upper Left Corner of the screen</i>	

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

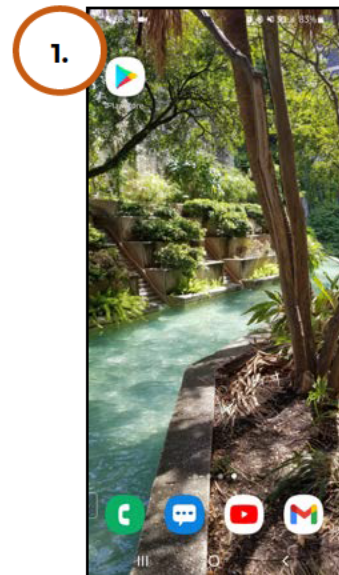
For Cashé FMS EVV to work properly on your device, please be sure you have the minimum system requirements as listed below.

- 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

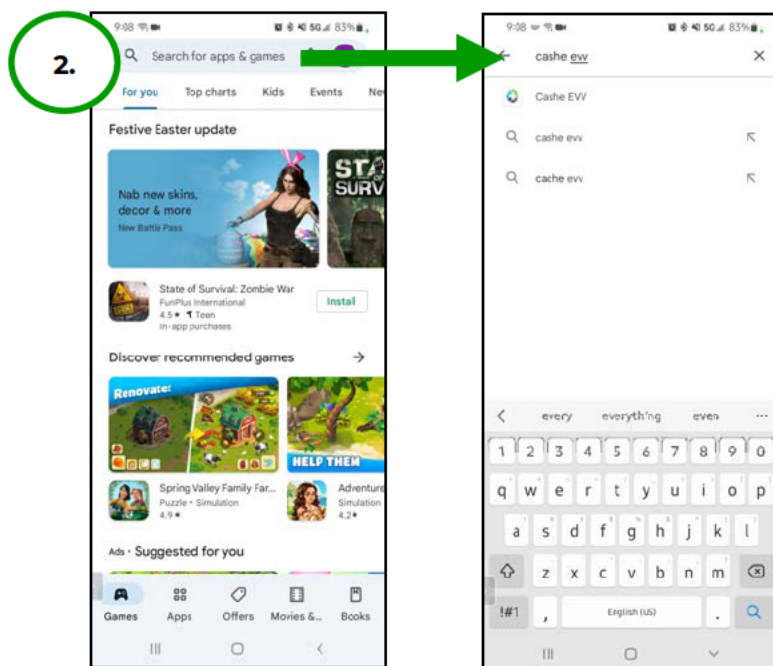
HOW TO ACCESS CASHÉ FMS EVV

ANDROID APP – PHONE AND TABLET

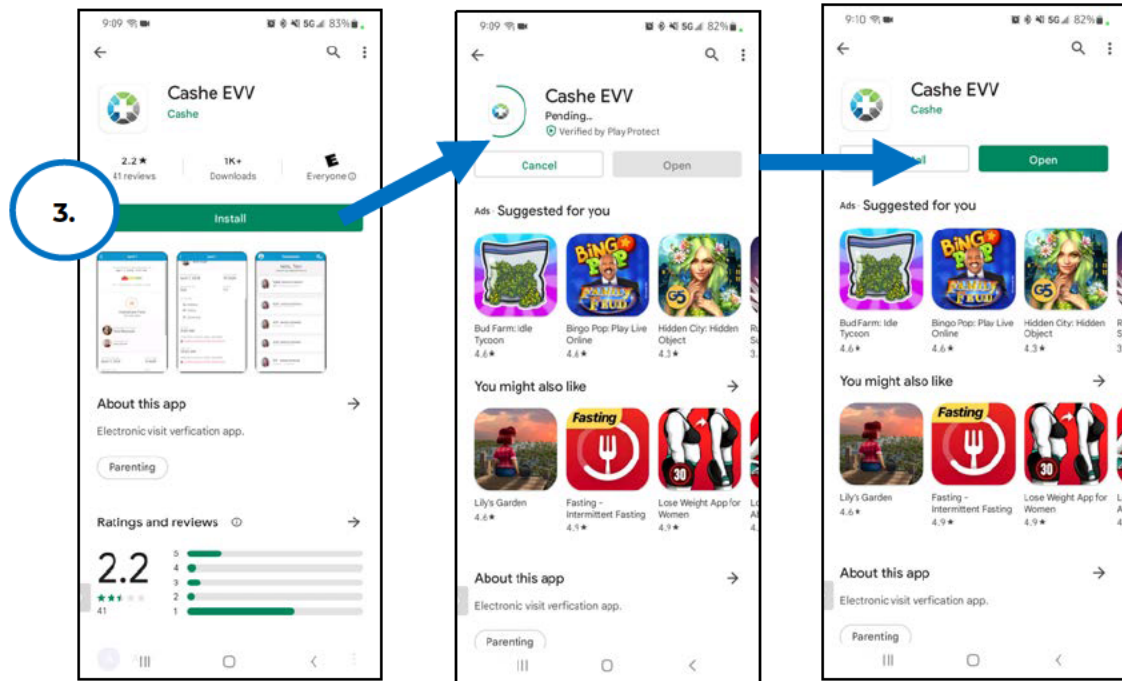
1. On your phone or tablet, select the **Play**  icon on your device to open the store. Please note: the Cashé EVV app is free to download.



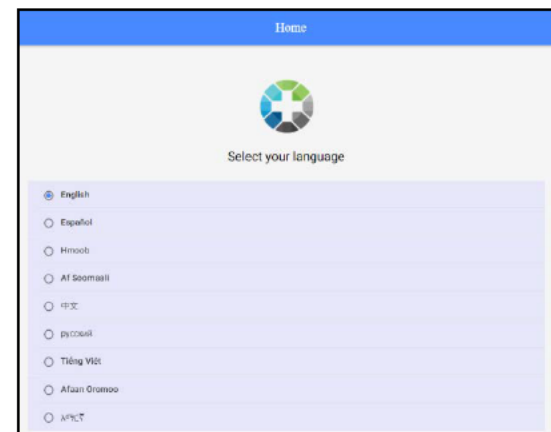
2. In the **search**, type the word **cashe evv** and select the app:



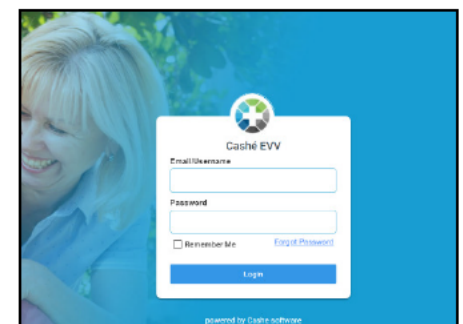
3. Select **Install** to add the app to your device. The app will now appear on the home screen of your device.




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.

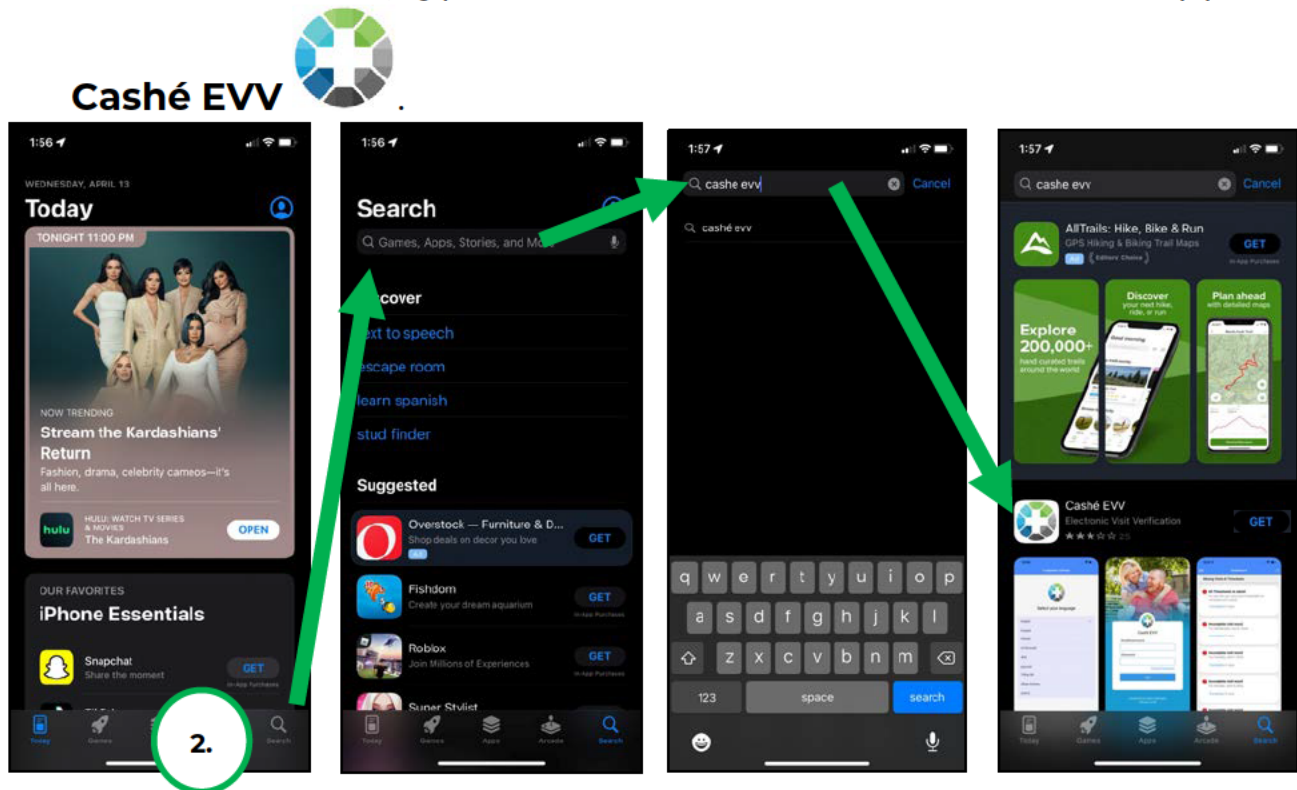


IOS/APPLE APP – IPAD AND IPHONE

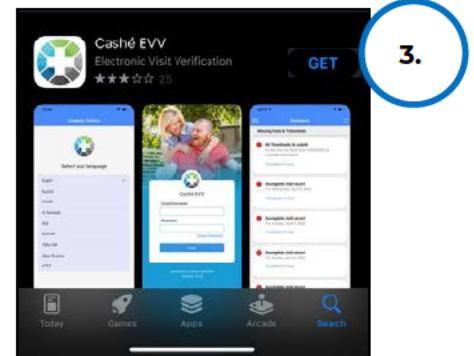
1. On your iPad or iPhone, select the **App Store**  icon on your device to open the store. Please note: the Cashé FMS EVV app is free to download.



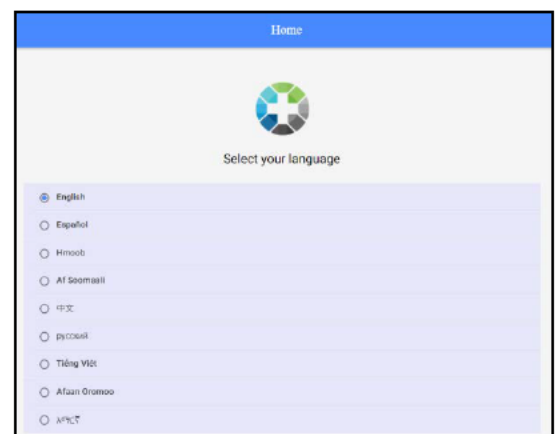
2. In the search tab, type the word **cashe evv** and select the app:



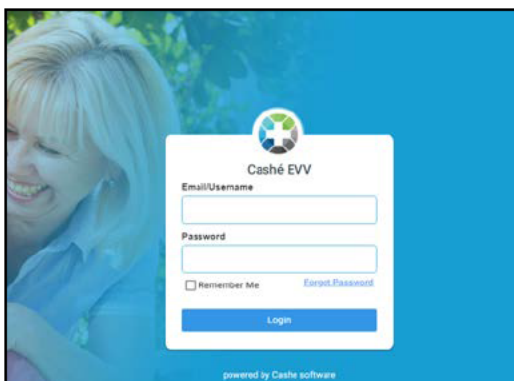
3. Tap the **GET** button to add the app to your device. The app will now appear on the home screen of your device.



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



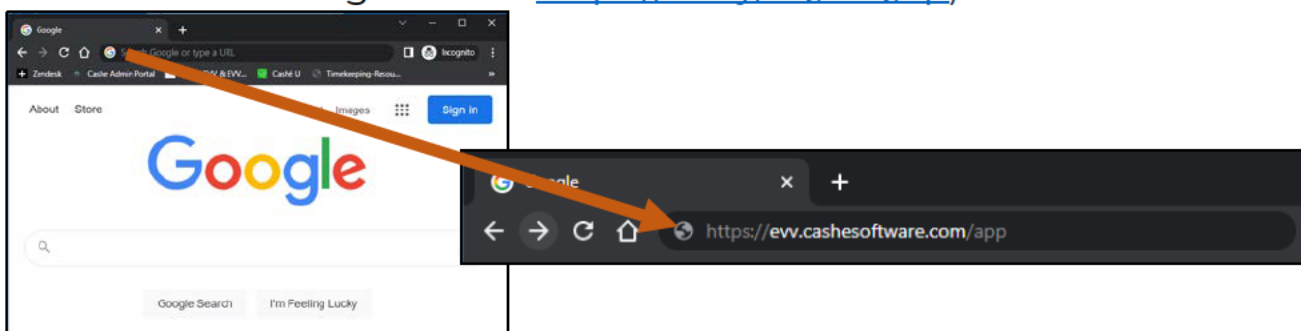
5. As soon as your preferred language is selected, you will need to select **OK** and will be directed to the Cashé FMS EVV login page.



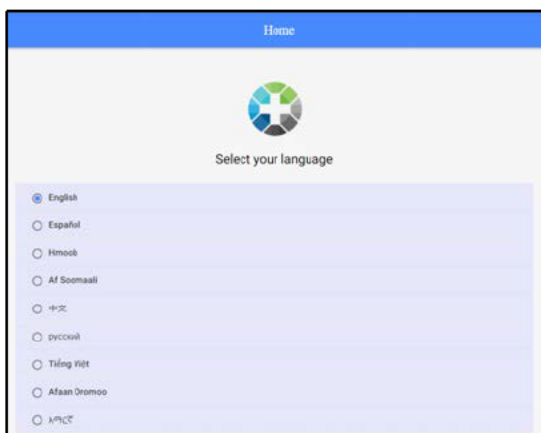
WEBSITE URL – COMPUTER

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

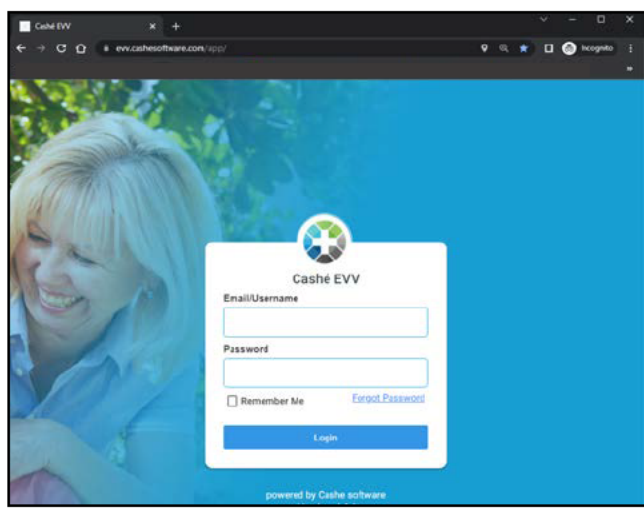
The vendor and Lifeworks recommend using Chrome as your browser for accessing the new system. (To download Chrome, select the following website <https://bit.ly/2QCJQ0p>)



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.



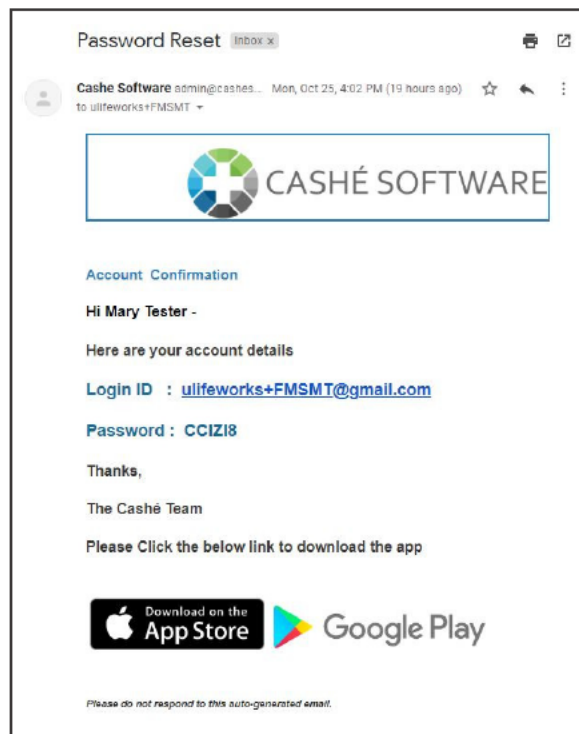
3. As soon as your preferred language is selected, you will need to select **OK** and will be directed to the Cashé FMS EVV login page.



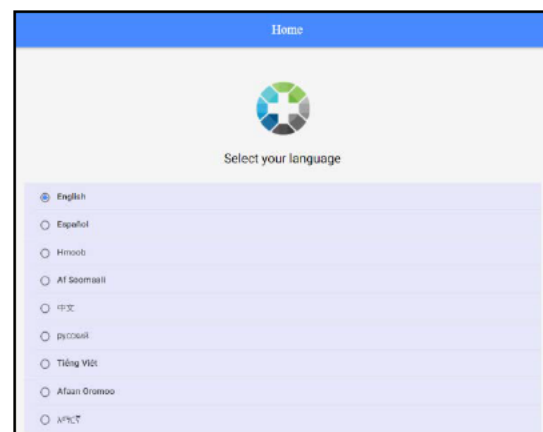
HOW TO LOG IN AND SET UP YOUR PASSWORD

1. Before accessing the new Timekeeping and Spending-Summary System, you will receive an email from admin@cashsoftware.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:

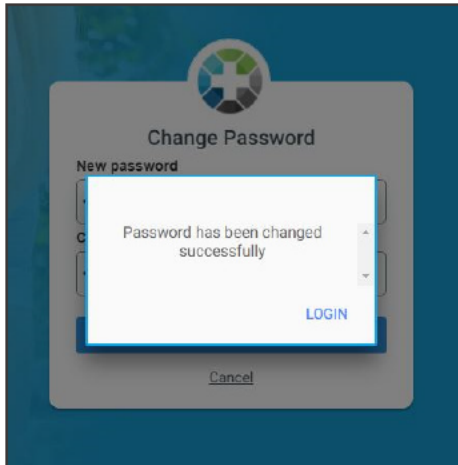
- Lowercase letters (includes spaces)
- Uppercase letters
- Special characters (!\$%^&*()_+|~-=\` {}[]:~;'<>?,./)
- A number (0-9)
- Be at least 8 characters in length

9. Enter a New Password of your choosing in the following:

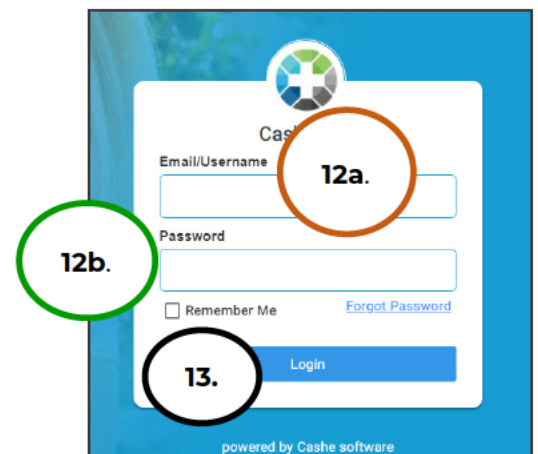
- New Password**
- Confirm Password**

10. Select **Proceed**

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



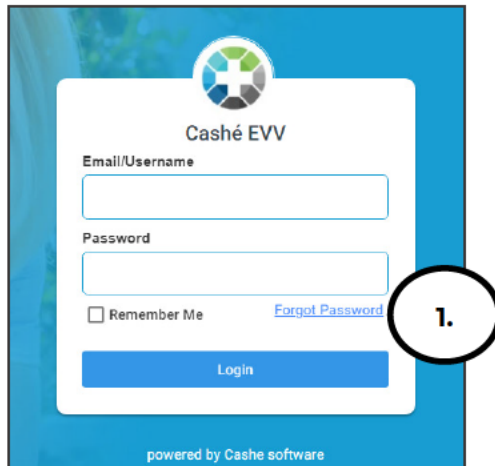
12. Enter the following:
- a. **Email/Username** = Login ID
 - b. **Password** = The password you just created
13. Select **Login**



NOTE: After logging in, you will be redirected to the Home screen of Cashé FMS EVV.

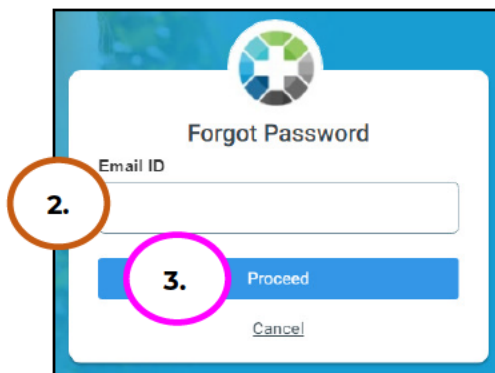
HOW TO RESET YOUR PASSWORD

1. On Login screen, select **Forgot Password**



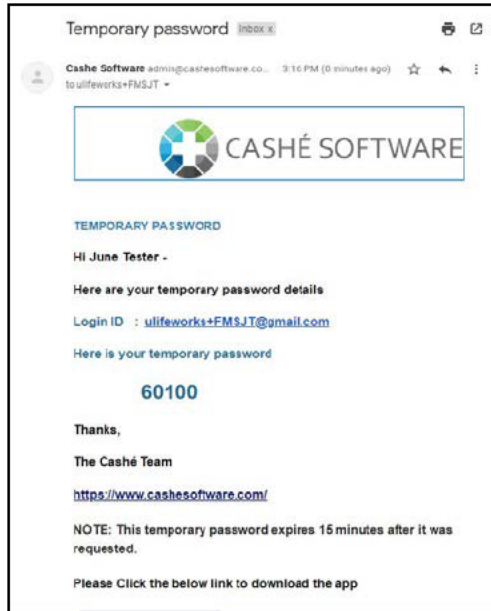
The screenshot shows the Cashé EVV login interface. At the top is a logo with a green cross. Below it, the text "Cashé EVV" is displayed. There are two input fields: "Email/Username" and "Password". Below the "Password" field is a checkbox labeled "Remember Me" and a blue link labeled "Forgot Password". A blue "Login" button is at the bottom. A black circle with the number "1." is placed over the "Forgot Password" link. At the very bottom, it says "powered by Cashe software".

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



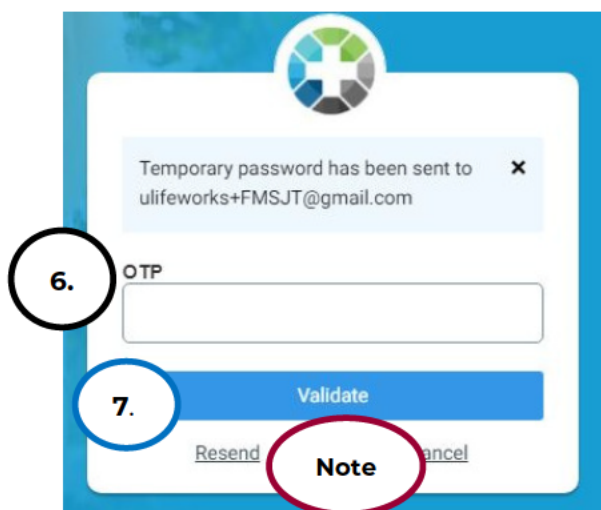
The screenshot shows the "Forgot Password" screen. At the top is the same logo. Below it, the text "Forgot Password" is displayed. There is one input field labeled "Email ID". Below the input field are two buttons: a blue "Proceed" button and a grey "Cancel" button. An orange circle with the number "2." is placed over the "Email ID" input field, and a pink circle with the number "3." is placed over the "Proceed" button.

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

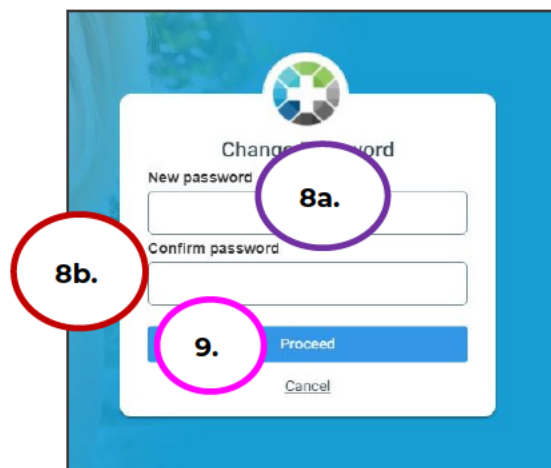
9. Select **Proceed**

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

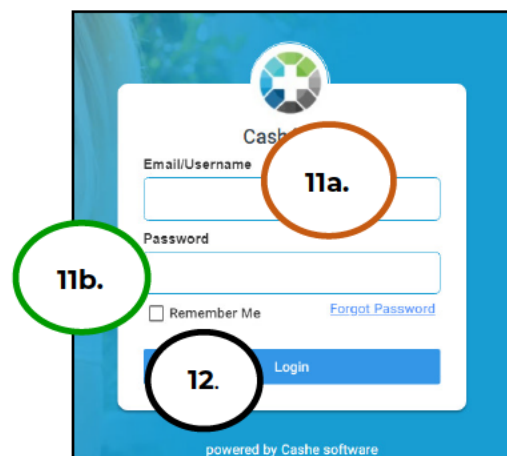
11. Enter the following:

- a. **Email/Username** = Login ID
- b. **Password** = The password you just created

12. Select **Login**



The screenshot shows a 'Change Password' form with a blue header and a white body. The form has two input fields: 'New password' and 'Confirm password'. A red circle labeled '8b.' points to the 'Confirm password' field. A purple circle labeled '8a.' points to the 'New password' field. A pink circle labeled '9.' points to the 'Proceed' button. A 'Cancel' link is also visible below the 'Proceed' button.

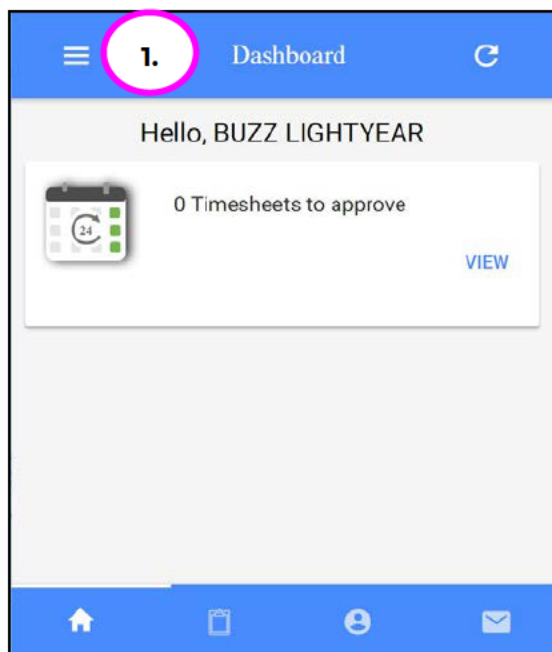


The screenshot shows a 'Cashé' login form with a blue header and a white body. The form has two input fields: 'Email/Username' and 'Password'. A green circle labeled '11b.' points to the 'Password' field. An orange circle labeled '11a.' points to the 'Email/Username' field. A black circle labeled '12.' points to the 'Login' button. There is a 'Remember Me' checkbox and a 'Forgot Password' link above the 'Login' button. The footer text 'powered by Cashe software' is visible.

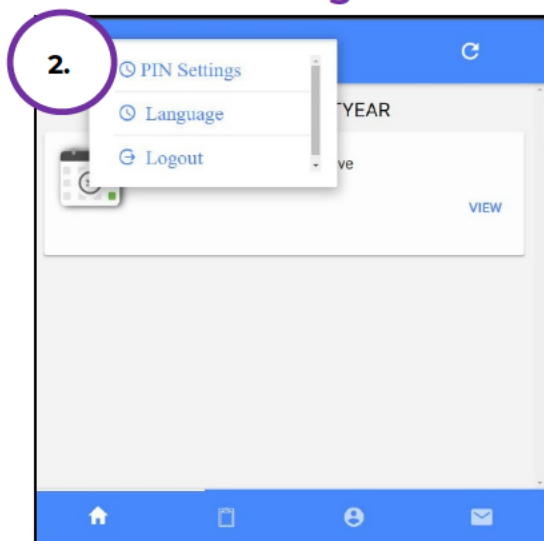
HOW TO SET UP A PIN FOR THE FIRST TIME

A PIN can be used to approve the time on an Employee's device at the end of their shift if you are available. This way the timecard is ready for Payroll without any further steps.

1. Select the **Menu** in the upper left corner



2. Select **PIN Settings** from the **Menu**



- 3. Enter chosen 4-digit PIN into the **ENTER PIN** box
- 4. Re-enter chosen 4-digit PIN into the **RE-ENTER PIN** box

A screenshot of a mobile application interface for PIN entry. At the top is a blue header bar with a back arrow and the word "PIN". Below the header, a blue circle with a white letter "B" is centered, followed by the text "BUZZ LIGHTYEAR". Underneath is the instruction "ENTER YOUR PIN" with a green note: "Pin number should be 4 digits." There are two input fields: "ENTER PIN" and "RE-ENTER PIN". A blue circle with the number "3." is placed over the "ENTER PIN" field, and a green circle with the number "4." is placed over the "RE-ENTER PIN" field. At the bottom right is a blue "CONFIRM" button.

- 5. Select **Confirm**

A screenshot of the same mobile application interface as above. In this view, a blue circle with the number "5." is placed over the "CONFIRM" button at the bottom right. The rest of the interface, including the header, logo, instructions, and input fields, remains the same.

6. Select the **arrow** in the upper left corner to return to the Home Screen

NOTE: After this initial set up, this view will change and so will the steps on how request a new PIN. Reference [HOW TO CHANGE YOUR PIN](#) or [HOW TO RESET YOUR PIN](#) for specific steps.

HOW TO USE CASHÉ FMS EVV

HOW TO REVIEW TIME ENTRIES

1. Select the **Please Approve** timecard you would like to review

2. Review the following:

- a. **Recipient of Care**
(Participant Name)
- b. **Provided By** (Employee Name)
- c. **Date of Service**
- d. **Service Type**
- e. **Total Time**
- f. **Employee Notes:** (this is an optional field) review any details about the visit that your employee had provided regarding the participant
- g. **Time In**
- h. **Time Out**

The screenshot shows the 'Approve Timesheet' screen in the Lifeworks FMS app. The interface includes a header with 'Cancel' and 'Approve Timesheet' buttons. Below the header, there's a section for 'Lifeworks FMS NULL'. The main content area contains several fields: 'RECIPIENT OF CARE' (BAT MAN), 'PROVIDED BY' (TAQUITO FUNNY), 'DATE OF SERVICE' (April 16, 2022), 'TOTAL TIME' (3 hr 59 min), and 'SERVICE TYPE' (Parent of Adult). There are also sections for 'ACTIVITIES', 'EMPLOYEE NOTES', and 'NOTES'. The 'TIME IN' and 'TIME OUT' fields are shown with timestamps '01:00 PM' and '05:00 PM' respectively. At the bottom, there are 'Reject' and 'Approve' buttons. Callouts a through h are placed over the following elements: a. Recipient of Care, b. Provided By, c. Date of Service, d. Service Type, e. Total Time, f. Employee Notes, g. Time In, and h. Time Out.

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

3. Enter any **notes** you would like to record about the visit.

The screenshot shows the 'Approve Timesheet' screen. At the top, there is a 'Cancel' button and the title 'Approve Timesheet'. Below the title is a 'NOTES' section with a text input field labeled 'Enter your notes here'. Underneath the notes section, the 'TIME IN' is displayed as '01:00 PM' and the 'TIME OUT' is displayed as '05:00 PM'. Both time entries are preceded by a green checkmark and the text 'LOCATION VERIFIED BY GPS'. At the bottom of the screen, there is a red 'Reject' button and a blue 'Approve' button. A green circle with the number '3.' is overlaid on the left side of the screen, pointing to the notes section.

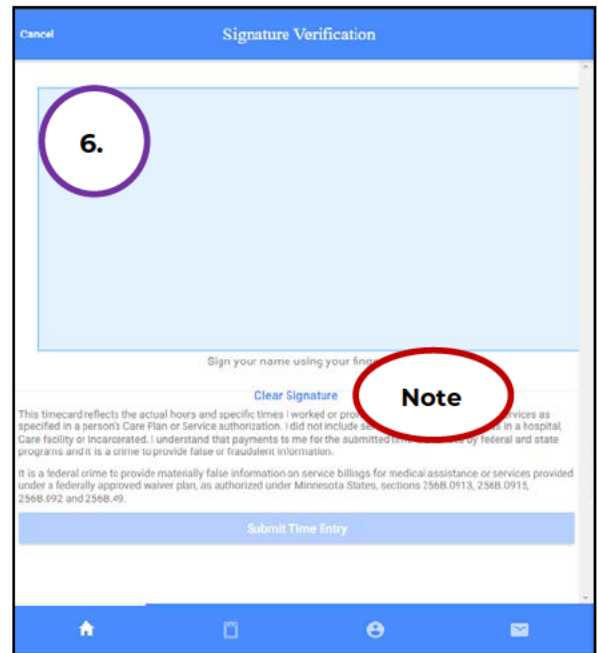
4. To approve the time, continue to Step 5. To Reject the time, continue in the [How to Reject Time Entries](#) section.

5. Submit the entry by selecting **Approve**.

This screenshot is identical to the one above, showing the 'Approve Timesheet' screen with the 'NOTES' section, 'TIME IN' (01:00 PM), 'TIME OUT' (05:00 PM), and 'Reject'/'Approve' buttons. A blue circle with the number '5.' is overlaid on the bottom right corner of the screen, pointing to the 'Approve' button.

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

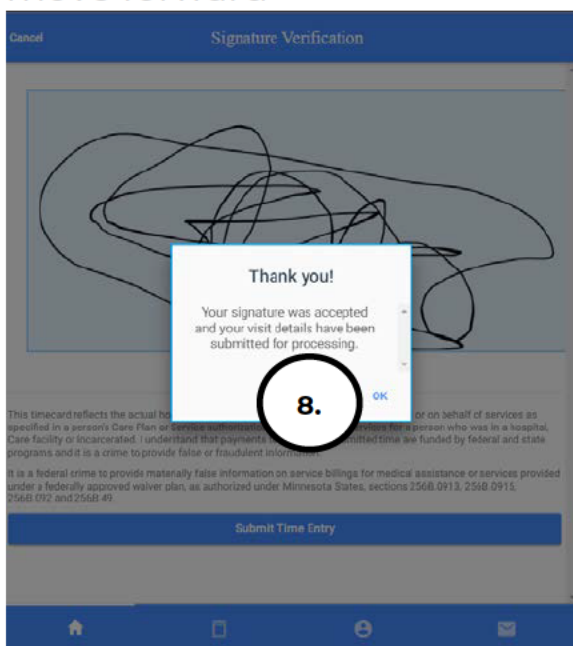
NOTE: If you make a mistake, you can clear your signature by selecting the **Clear Signature** text displayed at the bottom of the box.



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



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



REMINDER: If the time entry needs editing or is incorrect, reject the time, continue in the [How to Reject Time Entries](#) section.

HOW TO REJECT TIME ENTRIES

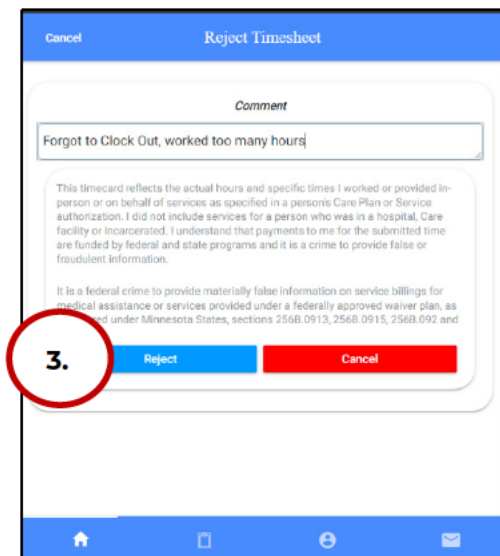
1. If you are choosing not to approve the employee's time entries, select the **Reject**.

The screenshot shows the 'Approve Timesheet' screen. At the top, there is a 'Cancel' button and the title 'Approve Timesheet'. Below this is a 'NOTES' section with a text input field labeled 'Enter your notes here'. The 'TIME IN' is 01:00 PM and 'TIME OUT' is 05:00 PM. Both times are marked with a green checkmark and the text 'LOCATION VERIFIED BY GPS'. Below the times is a disclaimer: '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 Statutes, sections 256B.0913, 256B.0915, 256B.092 and 256B.49.' At the bottom, there are two buttons: 'Reject' (highlighted with a red circle and the number '1.') and 'Approve'.

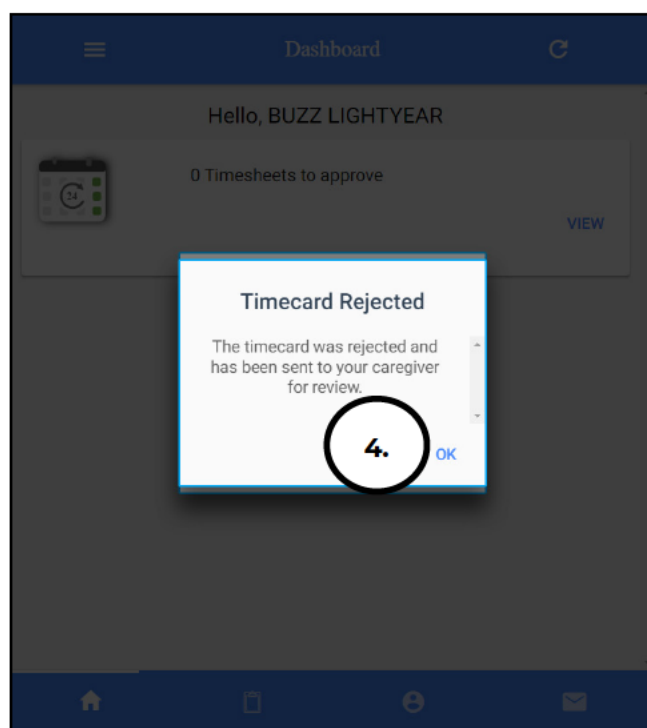
2. Enter **notes** in the text field detailing why the visit is rejected.

The screenshot shows the 'Reject Timesheet' screen. At the top, there is a 'Cancel' button and the title 'Reject Timesheet'. Below this is a 'Comment' section with a text input field labeled 'Enter notes to reject timesheet' (highlighted with a green circle and the number '2.'). Below the text field is the same disclaimer as in the previous screen: '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 Statutes, sections 256B.0913, 256B.0915, 256B.092 and 256B.49.' At the bottom, there are two buttons: 'Reject' and 'Cancel'.

Then select the **Reject** button.



3. Select **OK** in the **Timecard Rejected**. The timecard was rejected and has been sent to your caregiver for review box to move forward



4. The time entry has gone **BACK** to the employee to be corrected & resubmitted.

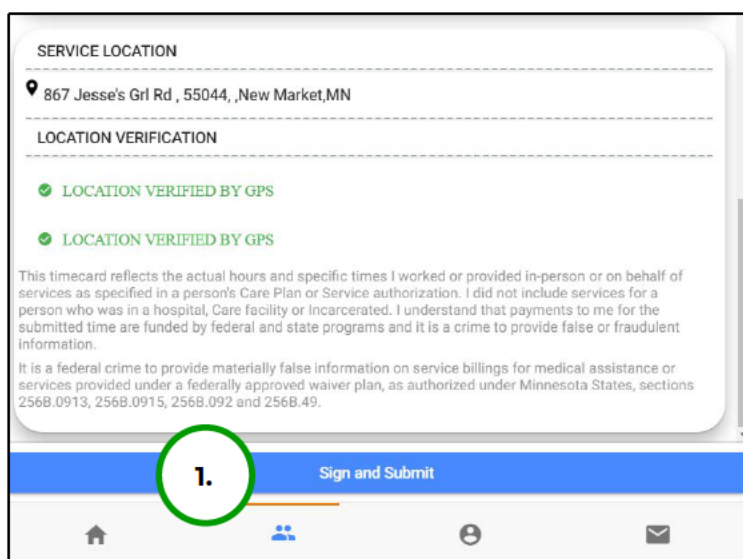
ADDITIONAL FEATURES OF CASHÉ FMS EVV

HOW TO APPROVE TIME ENTRIES

OPTION 1 – SIGN, SUBMIT, AND RESPONSIBLE PARTY APPROVES

*Use this option if you, as the Responsible Party, **IS** present at the end of your Employee's shift while they are clocking out.

1. Your Employee will select **Sign and Submit**



The screenshot shows a mobile application interface for time entry. At the top, under 'SERVICE LOCATION', is the address '867 Jesse's Grl Rd , 55044, ,New Market,MN'. Below this is a 'LOCATION VERIFICATION' section with two green checkmarks and the text 'LOCATION VERIFIED BY GPS'. A disclaimer paragraph follows, stating that the timecard reflects actual hours and that it is a crime to provide false information. At the bottom, a blue bar contains the text '1. Sign and Submit', where the '1.' is circled in green. Below this bar is a navigation bar with icons for home, people, a clock, and an envelope.

2. Your employee will use their touch screen or their mouse to **sign** their name inside of the text box.

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

3. Your Employee will 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. Your Employee will hand their device to the you, the responsible party
6. You, the **Responsible Party**, will use the Employee's touch screen or the Employee's 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

7. You, as the Responsible Party, enter your **4-digit PIN**

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

The screenshot shows a mobile application interface titled "Signature Verification". At the top, there is a "Cancel" button. Below it is a large blue box containing a black ink signature. Underneath the signature, the text reads: "David Tester is signing this timecard on behalf of Erin Tester. Sign your name using your finger." Below this text is a "CLEAR SIGNATURE" link. Further down is a text input field labeled "Enter your own PIN" with four asterisks. Below the PIN field, a green message states: "PIN HAS BEEN SUCCESSFULLY VERIFIED". A paragraph of legal disclaimer text follows. At the bottom of the screen, there is a blue button labeled "Submit Time Entry", which is circled with a pink circle and the number "8". The bottom navigation bar includes icons for home, a group of people, a clock, and an envelope.

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

This screenshot shows the same "Signature Verification" screen as before, but with a white dialog box overlaid in the center. The dialog box has the title "Thank you!" and the message: "Your signature was accepted and your visit details have been submitted for processing." At the bottom right of the dialog box is a blue button labeled "OK", which is circled with a black circle and the number "9". The background screen is dimmed, showing the signature, PIN field, and "Submit Time Entry" button.

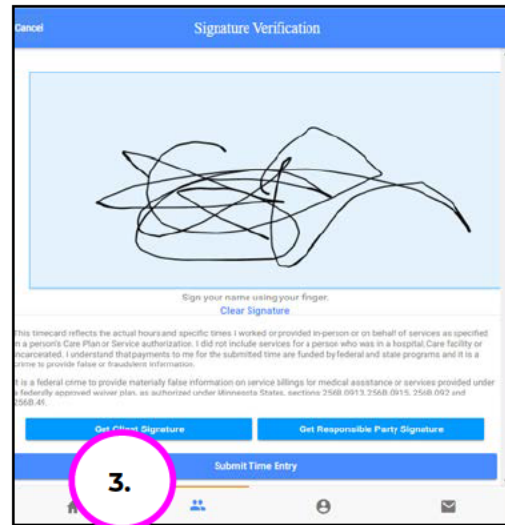
OPTION 2 – SIGN AND SUBMIT TO RESPONSIBLE PARTY FOR APPROVAL

1. Your Employee will select the **Sign and Submit**

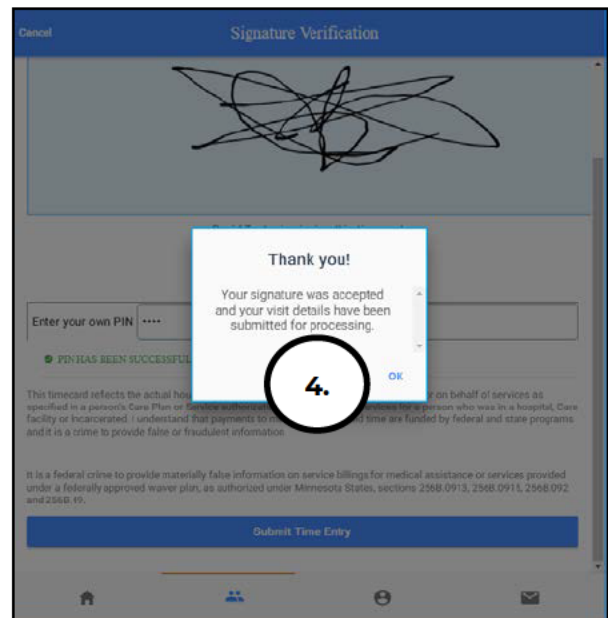
2. Your Employee will use their touch screen or their mouse to **sign** their name inside of the text box.

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

3. Your Employee will select the **Submit Time Entry** button.



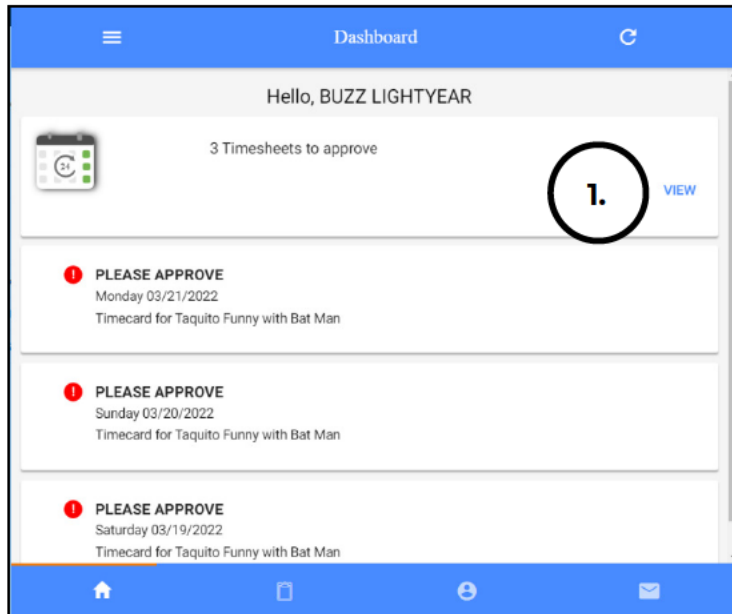
4. Your Employee will select **OK** in the **Thank you! Your Signature was accepted, and your visit details have been submitted for processing** box to move forward



5. You, as the Responsible Party, will login to your Cashé FMS EVV account to Review your Employee's time. Reference [HOW TO REVIEW TIME](#)

HOW TO APPROVE TIME ENTRIES IN BULK

1. Select **view** to the right of **Timesheets to approve**



2. To review in more detail each time entry, select **View** in the upper right corner

NOTE: To expand the details for each shift, select the arrow in the upper right corner. See expanded view on the following page.

The screenshot shows the 'Complete Visit' screen for a caregiver named Taquito Funny. The screen displays three time entries for a client named Bat Man. The first entry is for March 21, 2022, and the second for March 20, 2022. A red circle highlights the 'View' button next to the first entry. A red arrow points from the 'Note' button in the first entry's service details to an expanded view of the service details on the right.

Complete Visit

Hello, BUZZ LIGHTYEAR

2. View

Date of service
March 21, 2022

Caregiver
Taquito Funny

Client
Bat Man

Time in	Time out	Total Time
01:00 PM	05:00 PM	3 hr 59 min

Service details

☒ Do you want to approve this timesheet?

Note

Date of service
March 20, 2022

Caregiver
Taquito Funny

Client
Bat Man

Time in	Time out	Total Time
01:00 PM	05:00 PM	3 hr 59 min

Service details

☒ Do you want to approve this timesheet?

Date of service
March 19, 2022

Caregiver
Taquito Funny

Client
Bat Man

Time in	Time out	Total Time
01:00 PM	04:00 PM	3 hr 0 min

Service details

☒ Do you want to approve this timesheet?

Service details

Service type
Parent of Adult

ACTIVITIES

☒ Do you want to approve this timesheet?

Sign and Approve

3. Review the time entries to ensure the following is correct:

- a. **Date of Service**
- b. **Caregiver**
(Employee Name)
- c. **Time In**
- d. **Time Out**
- e. **Total Time**
- f. **Service Type**

The screenshot shows the 'Complete Visit' screen in the LifeWORKS mobile app. The interface is blue and white. At the top, there are buttons for 'Cancel' and 'Complete Visit'. Below this is a greeting: 'Hello, BUZZ LIGHTYEAR'. The main form contains the following fields and values:

- Date of service:** March 21, 2022 (Annotated with 'a.')
- Caregiver:** Taquito Funny (Annotated with 'b.')
- Client:** Bat Man
- Time in:** 01:00 PM (Annotated with 'c.')
- Time out:** 05:00 PM (Annotated with 'd.')
- Total Time:** 3 hr 59 min (Annotated with 'e.')
- Service details:** A section with a dropdown menu for 'Service type' showing 'Parent of Adult' (Annotated with 'f.').
- ACTIVITIES:** A list with a green checkmark and the text 'Parent of Adult'.

At the bottom of the form is a 'Sign and Approve' button. The app's navigation bar at the very bottom contains icons for home, calendar, profile, and messages.

4. If the entry is correct for each shift confirm the check box

Do you want to approve this timesheet? is checked. Skip to Step 6.

4.

The screenshot shows the 'Complete Visit' screen for a user named BUZZ LIGHTYEAR. It displays service details for March 21, 2022, including caregiver Taquito Funny and client Bat Man. A table shows Time In (01:00 PM), Time out (05:00 PM), and Total Time (3 hr 59 min). Under 'Service details', the checkbox 'Do you want to approve this timesheet?' is checked. A 'Sign and Approve' button is at the bottom.

5. If an entry is incorrect, **uncheck** the box that reads **Do you want to approve this timesheet**. This entry will not be included in the bulk approval. Continue to Step 10 for further instructions.

This screenshot is identical to the previous one, but the checkbox 'Do you want to approve this timesheet?' is unchecked. A red circle highlights the checkbox area.

6. Submit the entries by selecting the **Sign and Approve** button.

Cancel

Complete Visit

Hello, BUZZ LIGHTYEAR

Date of service
March 21, 2022
View

Caregiver
Taquito Funny

Client
Bat Man

Time in
01:00 PM

Time out
05:00 PM

Total Time
3 hr 59 min

Service details

☒ Do you want to approve this timesheet?

Date of service
March 20, 2022
View

Caregiver
Taquito Funny

Client
Bat Man

Time in
01:00 PM

Time out
05:00 PM

Total Time
3 hr 59 min

Service details

☒ Do you want to approve this timesheet?

Date of service
March 19, 2022
View

Caregiver
Taquito Funny

Client
Bat Man

Time in
01:00 PM

Time out
04:00 PM

Total Time
3 hr 0 min

Service details

☒ Do you want to approve this timesheet?

6.

Sign and Approve

Home

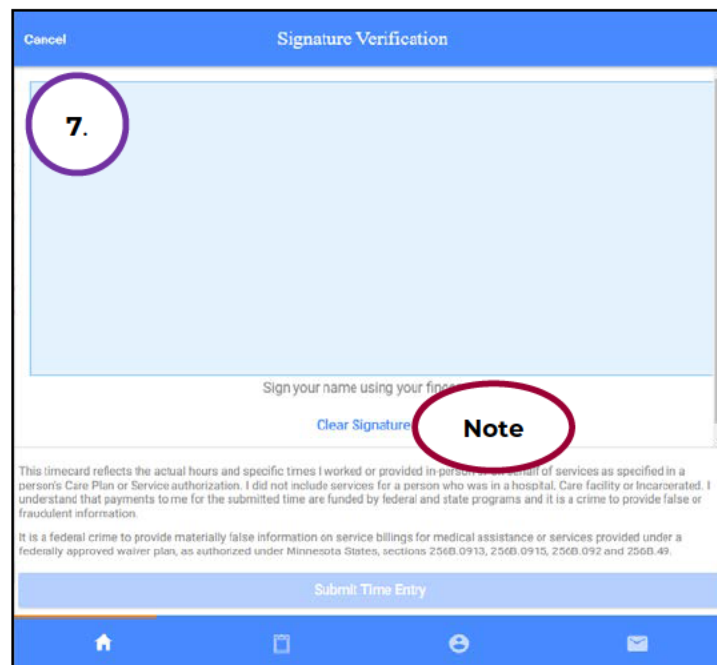
Calendar

Profile

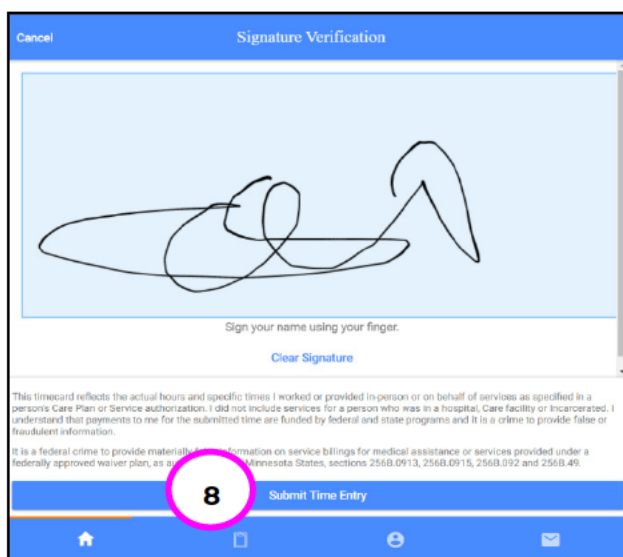
Messages

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

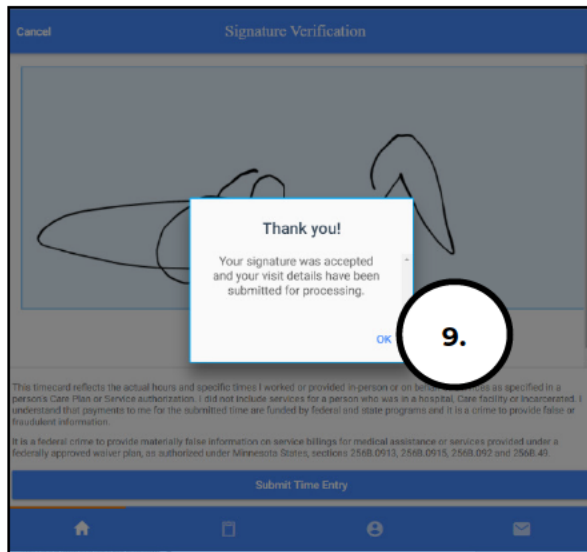
NOTE: If you make a mistake, you can clear your signature by selecting the **Clear Signature** text displayed at the bottom of the box.



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

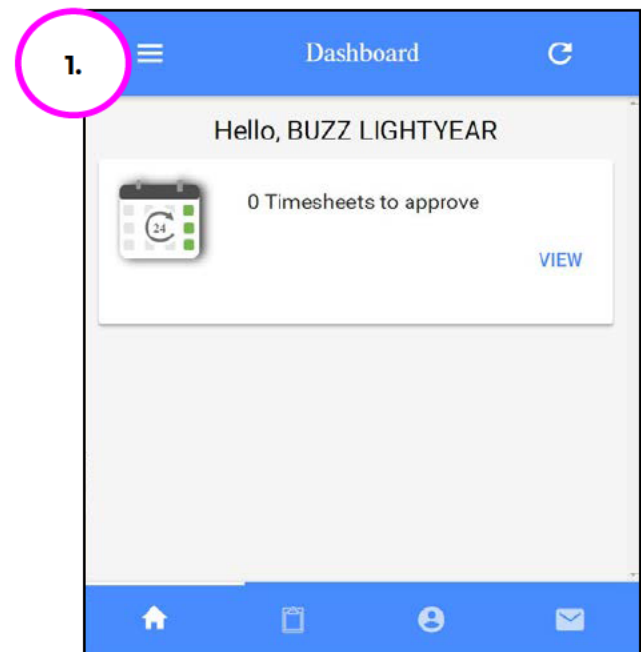


10. To review Incorrect Time entries reference [HOW TO REVIEW TIME](#)

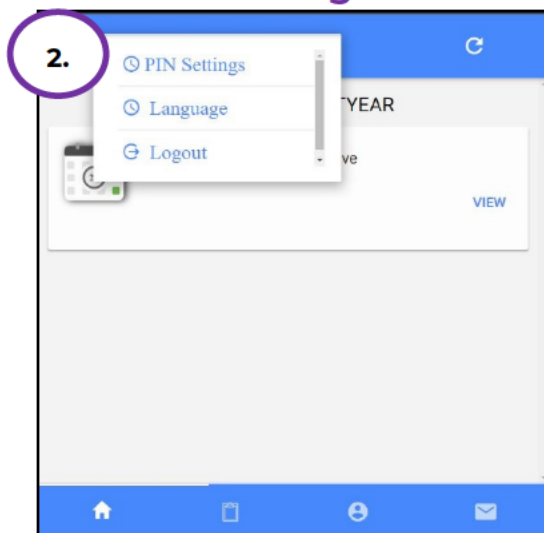
HOW TO CHANGE YOUR PIN

A PIN can be used to approve the time on an Employee's device at the end of their shift if you are available. This way the timecard is ready for Payroll without any further steps. If you have not set up your PIN, reference [HOW TO SET UP A PIN FOR THE FIRST TIME](#).

1. Select the **Menu** in the upper left corner



2. Select **PIN Settings** from the **Menu**



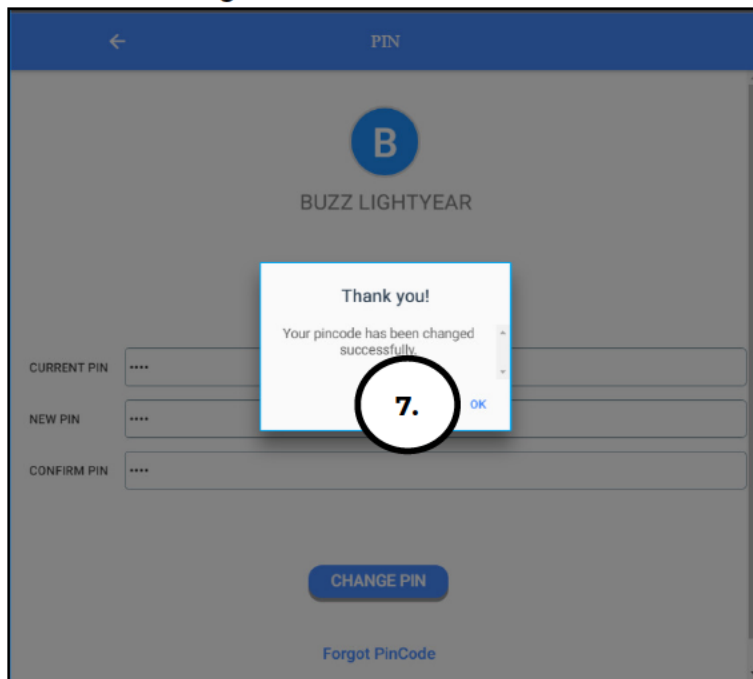
3. Enter current 4-digit PIN into the **CURRENT PIN** box
4. Enter a new 4-digit PIN into the **NEW PIN** box
5. Enter the same new 4-digit PIN into the **CONFIRM PIN** box

The screenshot shows a mobile app interface for changing a PIN. At the top is a blue header with a back arrow and the word "PIN". Below the header, there is a blue circle with the letter "B", followed by the text "BUZZ LIGHTYEAR" and "CHANGE YOUR PIN". There are three input fields, each with the placeholder text "Enter numbers only". The first field is labeled "CURRENT PIN" and has a red circle with the number "3." next to it. The second field is labeled "NEW PIN" and has a green circle with the number "4." next to it. The third field is labeled "CONFIRM PIN" and has an orange circle with the number "5." next to it. Below the input fields is a blue button labeled "CHANGE PIN" and a link labeled "Forgot PinCode".

6. Select **Change PIN**

The screenshot shows the same mobile app interface as the previous one. The input fields for "CURRENT PIN", "NEW PIN", and "CONFIRM PIN" are now filled with four dots each. The "CHANGE PIN" button is highlighted with a blue circle and the number "6." next to it. The "Forgot PinCode" link is still visible at the bottom.

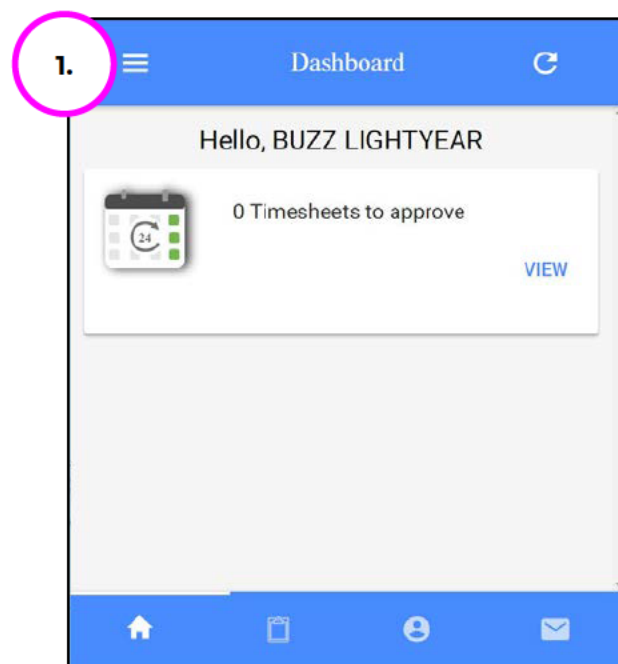
7. Select **OK** in the **Thank you! Your pincode has been changed successfully** box.



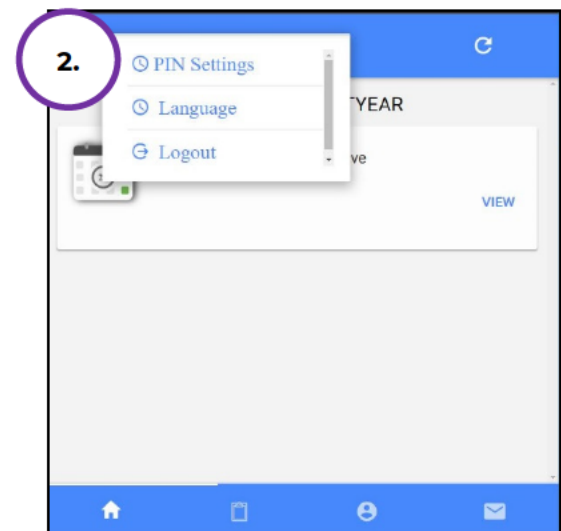
HOW TO RESET YOUR PIN

A PIN can be used to approve the time on an Employee's device at the end of their shift if you are available. This way the timecard is ready for Payroll without any further steps. If you have not set up your PIN, reference [HOW TO SET UP A PIN FOR THE FIRST TIME](#).

1. Select the **Menu** in the upper left corner



2. Select **PIN Settings** from the **Menu**



3. Select **Forgot PinCode**

The screenshot shows a mobile app interface for changing a PIN. At the top is a blue header with a back arrow and the word 'PIN'. Below the header is a blue circle with a white letter 'B', followed by the text 'BUZZ LIGHTYEAR'. Underneath is the text 'CHANGE YOUR PIN'. There are three input fields: 'CURRENT PIN' with the placeholder 'Enter numbers only', 'NEW PIN' with the placeholder 'Enter numbers only', and 'CONFIRM PIN' with the placeholder 'Enter numbers only'. Below these fields is a blue button labeled 'CHANGE PIN'. At the bottom, there is a link labeled 'Forgot PinCode' which is circled with a black circle and the number '3'.

4. Enter your Cashé FMS EVV Password in the **PASSWORD** box

5. Enter your new 4-digit PIN in the **NEW PIN** box

6. Enter the same new 4-digit PIN in the **CONFIRM PIN** box

The screenshot shows the same mobile app interface as before, but with different options. The text 'CHANGE YOUR PIN' has been replaced with 'FORGOT PIN'. The input fields are now: 'PASSWORD' (circled in red with a black circle and the number '4'), 'NEW PIN' (circled in green with a black circle and the number '5'), and 'CONFIRM PIN' (circled in orange with a black circle and the number '6'). The 'CHANGE PIN' button remains at the bottom.

7. Select the **Change PIN** words

← PIN

B

BUZZ LIGHTYEAR

FORGOT PIN

PASSWORD

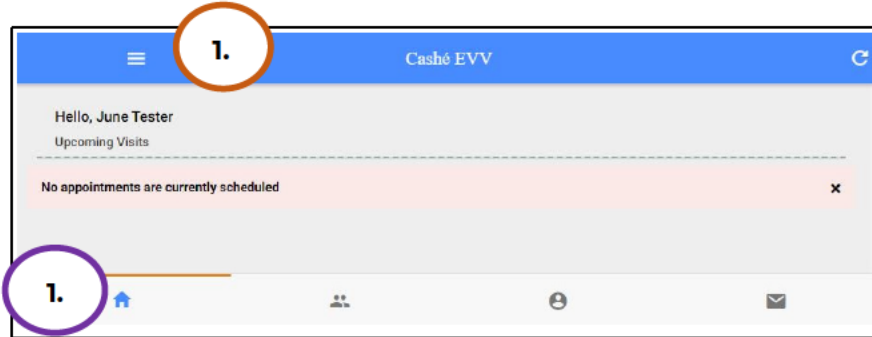
NEW PIN

CONFIRM PIN

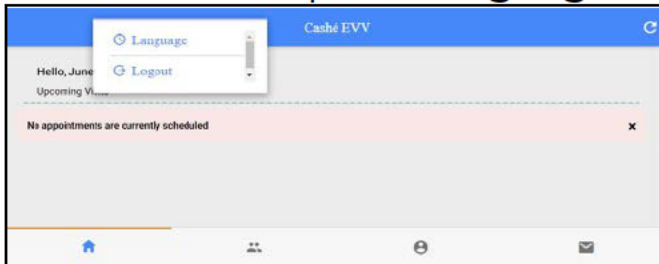
7. **CHANGE PIN**

HOW TO CHANGE YOUR PREFERRED LANGUAGE

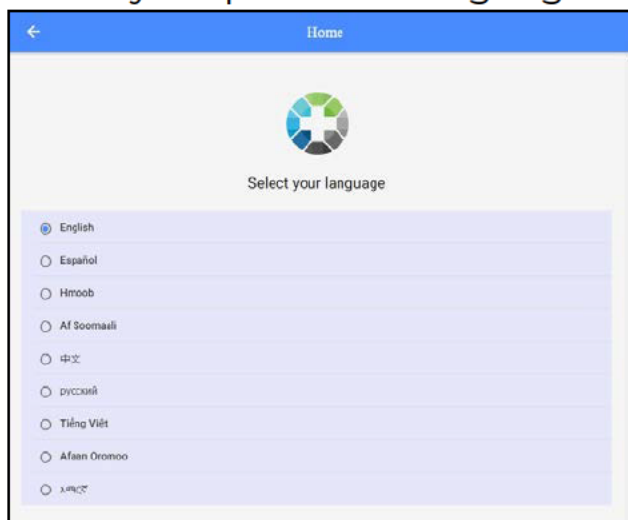
1. Select the **Menu** Icon in the upper left corner of the **Home** Screen



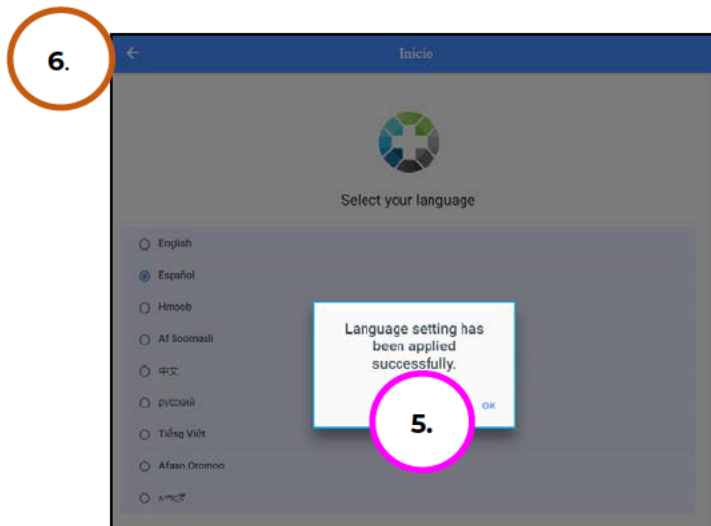
2. Select the first option **Language**



3. Select your preferred language

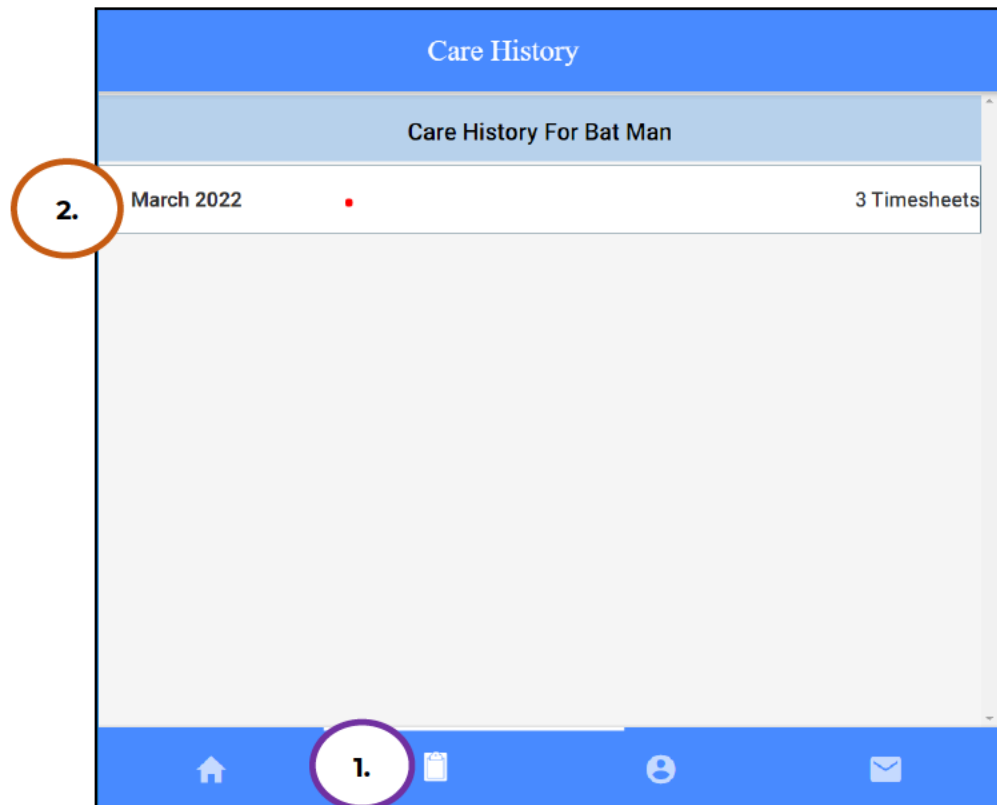


4. A confirmation message, **Language setting has been applied successfully** will appear
5. Select **OK**
6. Select the **back arrow** in the upper left corner of the screen to return to the Home Screen

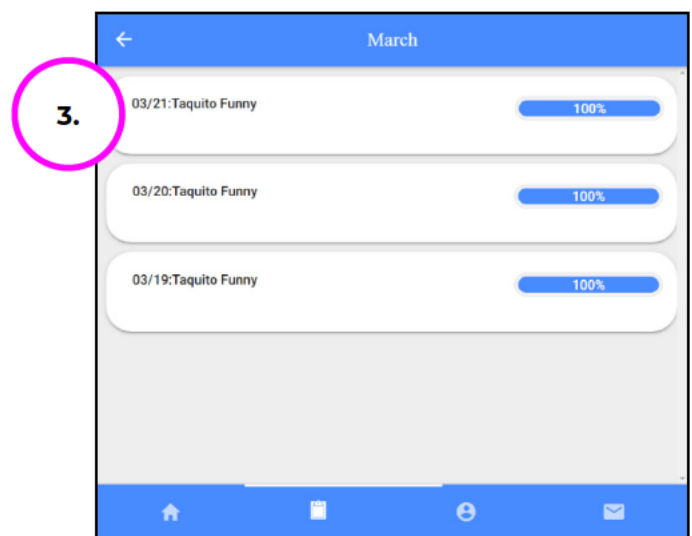


HOW TO VIEW APPROVED TIME ENTRIES

1. Select **Care History**, the 2nd image located at the bottom
2. Select the **Month** you would like to review time entries



3. Select the **Day** you would like to review the time entry



4. You can see the following:

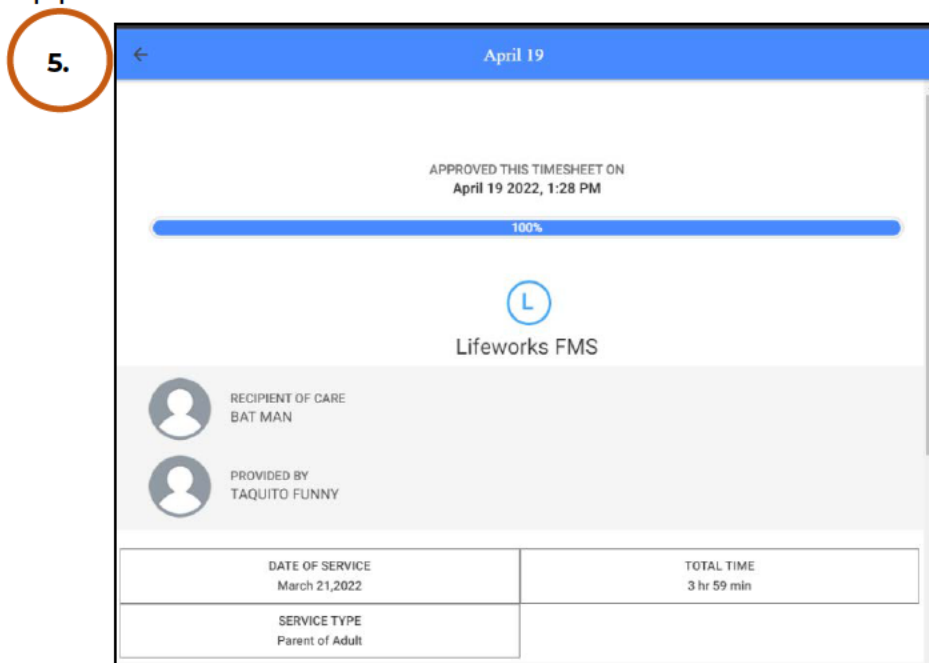
- a. **Status of the Timesheet**
- b. **Recipient of Care** (Participant Name)
- c. **Provided By** (Employee Name)
- d. **Date of Service**
- e. **Total Time**
- f. **Service Type**
- g. **Employee Notes:** (this is an optional field)
review any details about the visit that your employee had provided regarding the participant
- h. **Time In**
- i. **Time Out**

The screenshot shows the Lifeworks FMS mobile app interface for a timesheet entry on April 19, 2022. The interface is divided into several sections:

- Approval Status:** A progress bar at the top indicates the timesheet is 100% approved, with a timestamp of April 19, 2022, 1:28 PM.
- Recipient of Care:** A section labeled "RECIPIENT OF CARE" with the name "BAT MAN".
- Provided By:** A section labeled "PROVIDED BY" with the name "TAQUITO FUNNY".
- Service Details:** A table with the following information:

DATE OF SERVICE	March 21, 2022	TOTAL TIME	3 hr 59 min
SERVICE TYPE	Parent of Adult		
- Activities:** A section with a checkmark and the text "Parent of Adult".
- Client Notes:** A section for client notes.
- Employee Notes:** A section for employee notes.
- Time In/Out:** A section showing "TIME IN" at 1:00 PM and "TIME OUT" at 5:00 PM.
- Location Verification:** A section showing "LOCATION" and "LOCATION VERIFIED BY GPS".

- To return to the previous screen, select the **back arrow** in the upper left corner



HOW TO ACCESS YOUR SERVICE UTILIZATION

1. Select **My Profile**, the 3rd image located at the bottom

My Profile

BUZZ LIGHTYEAR
Responsible Party

Personal Information

Phone
(651) 587-9169

Email
ulifeworks+FMSBL@gmail.com

Address
123 Infinity Court, 55391

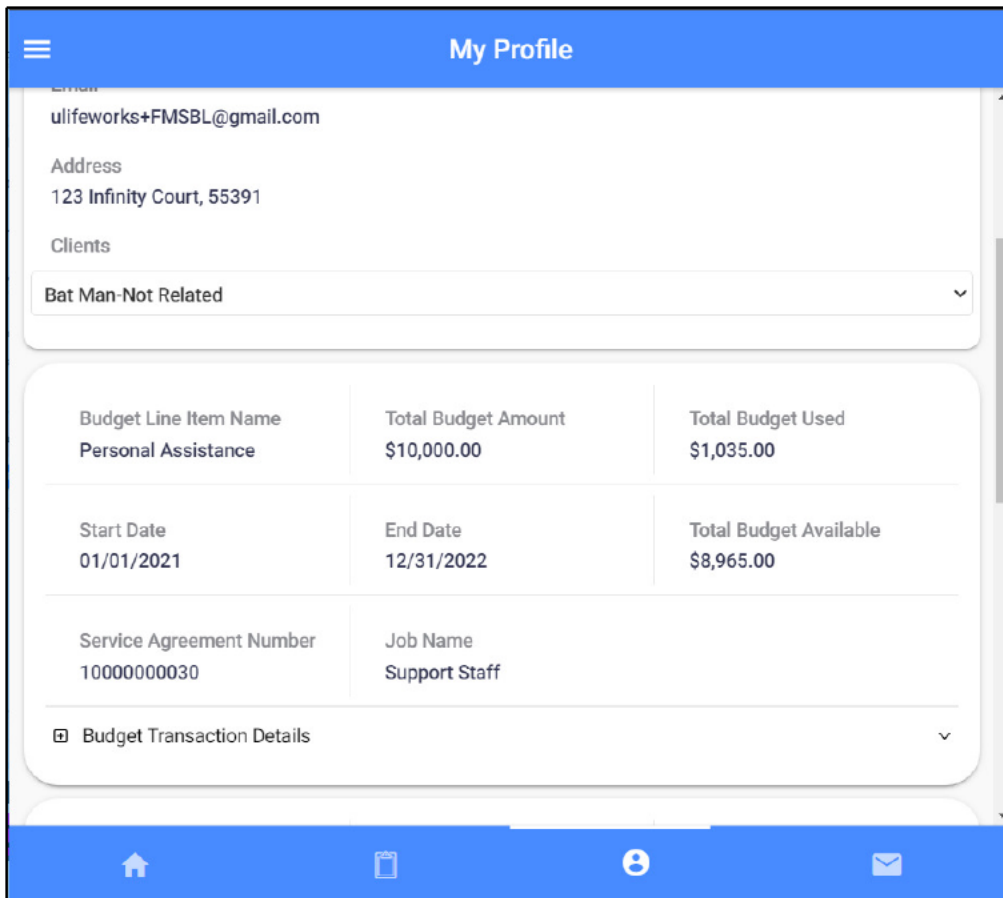
Clients
Bat Man-Not Related

Budget Line Item Name Personal Assistance	Total Budget Amount \$10,000.00	Total Budget Used \$1,035.00
Start Date 01/01/2021	End Date 12/31/2022	Total Budget Available \$8,965.00
Service Agreement Number 10000000030	Job Name Support Staff	

1.

2. Located after the Personal Information section are the Service Utilization details.

NOTE: This area displays the dollars that have been currently used. This view shows the participant, budget line-item name, budget date range, the Service Agreement number, Total Budget Amount, Total Budget Used, and Total Budget Available in dollars. It also includes a Budget Transaction Details section for each Budget Line Item.



The screenshot shows a mobile application interface titled "My Profile". It features a blue header bar with a menu icon on the left and the title "My Profile" in the center. Below the header, there is a white card containing personal information: an email address "ulifeworks+FMSBL@gmail.com", an address "123 Infinity Court, 55391", and a client selection dropdown menu currently set to "Bat Man-Not Related". Below this card is another white card displaying budget details in a table-like format. The first row shows "Budget Line Item Name" as "Personal Assistance", "Total Budget Amount" as "\$10,000.00", and "Total Budget Used" as "\$1,035.00". The second row shows "Start Date" as "01/01/2021", "End Date" as "12/31/2022", and "Total Budget Available" as "\$8,965.00". The third row shows "Service Agreement Number" as "10000000030" and "Job Name" as "Support Staff". At the bottom of this card is a section titled "Budget Transaction Details" with a dropdown arrow. The entire app interface is framed by a blue bottom bar with four icons: a home icon, a document icon, a person icon, and an envelope icon.

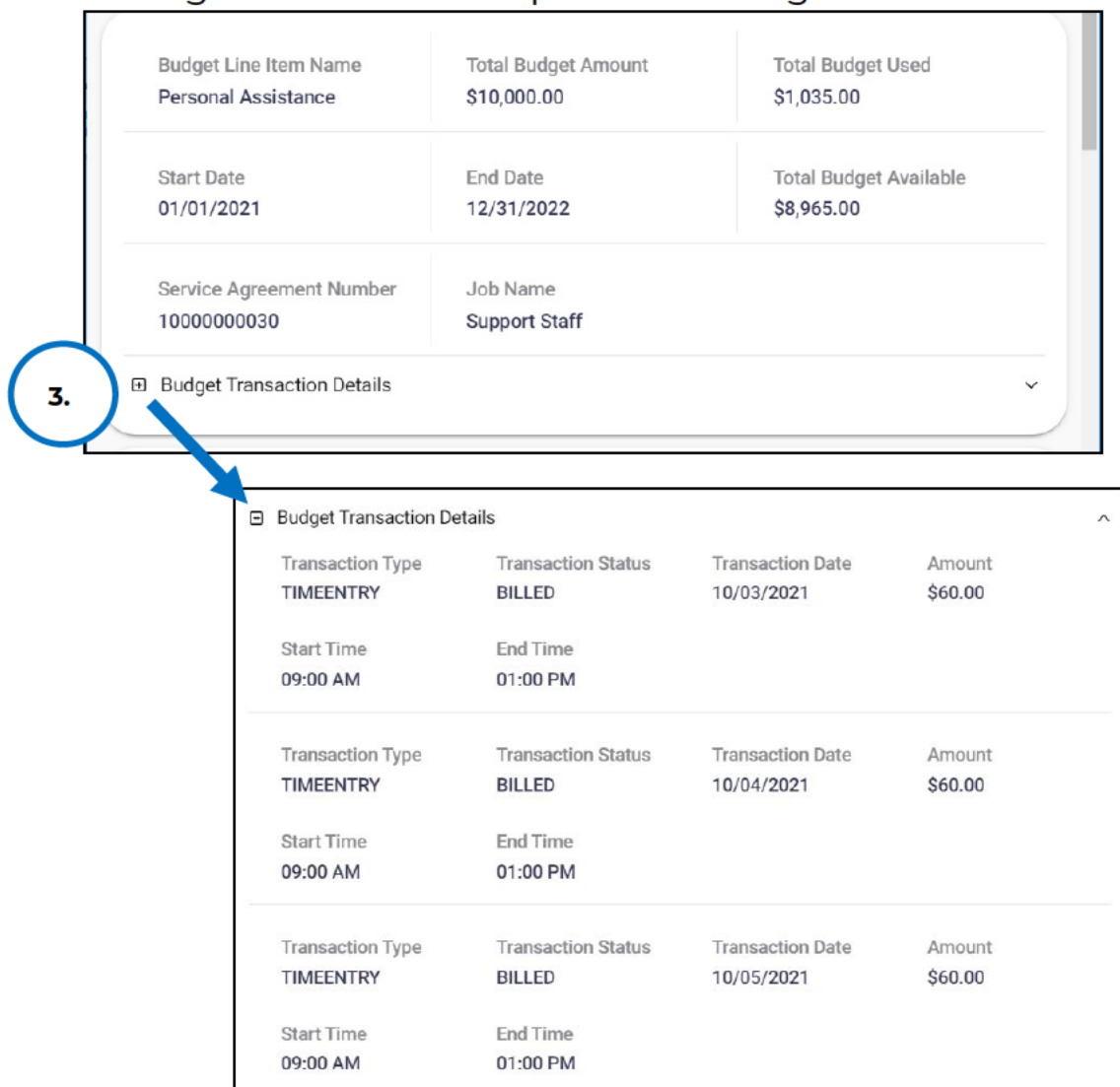
Budget Line Item Name	Total Budget Amount	Total Budget Used
Personal Assistance	\$10,000.00	\$1,035.00

Start Date	End Date	Total Budget Available
01/01/2021	12/31/2022	\$8,965.00

Service Agreement Number	Job Name
10000000030	Support Staff

☐ Budget Transaction Details

3. Select the **plus sign (+)** below the Service Agreement Number for each Budget Line item to expand the Budget Transaction Details.



The screenshot displays a budget summary for 'Personal Assistance' with a total budget of \$10,000.00 and a total budget used of \$1,035.00. The start date is 01/01/2021 and the end date is 12/31/2022. The total budget available is \$8,965.00. The service agreement number is 10000000030 and the job name is Support Staff. Below this summary, there is a section for 'Budget Transaction Details' which is currently collapsed. A blue circle with the number '3.' and an arrow points to the plus sign icon next to the 'Budget Transaction Details' label, indicating where to click to expand the details.

Budget Line Item Name	Total Budget Amount	Total Budget Used
Personal Assistance	\$10,000.00	\$1,035.00

Start Date	End Date	Total Budget Available
01/01/2021	12/31/2022	\$8,965.00

Service Agreement Number	Job Name
10000000030	Support Staff

3. ☐ Budget Transaction Details

☒ Budget Transaction Details

Transaction Type	Transaction Status	Transaction Date	Amount
TIMEENTRY	BILLED	10/03/2021	\$60.00

Start Time	End Time
09:00 AM	01:00 PM

Transaction Type	Transaction Status	Transaction Date	Amount
TIMEENTRY	BILLED	10/04/2021	\$60.00

Start Time	End Time
09:00 AM	01:00 PM

Transaction Type	Transaction Status	Transaction Date	Amount
TIMEENTRY	BILLED	10/05/2021	\$60.00

Start Time	End Time
09:00 AM	01:00 PM

COMMONLY ASKED QUESTIONS

MISSING LOGIN INFORMATION

1. An email was sent from admin@cashessoftware.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 CashSupport@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.cashessoftware.com/app/>.
4. If you still cannot log in, please submit an email ticket to our technical team at CashSupport@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:

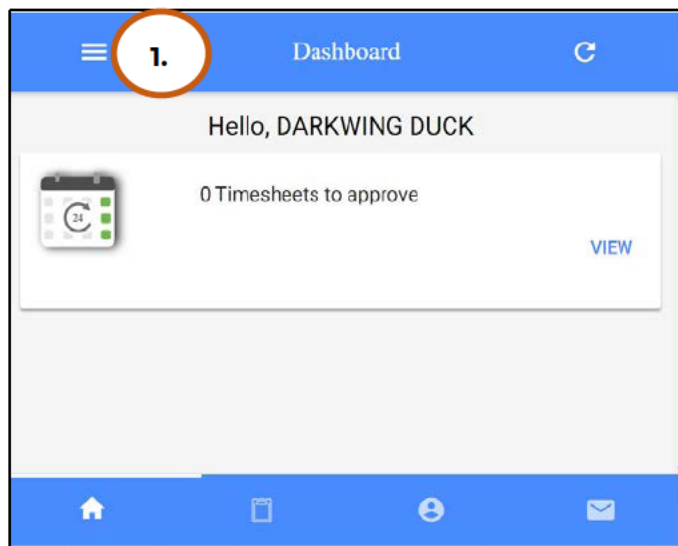
- Screenshot of where the language is not updated
- Your Full Name
- Your Username
- Preferred contact method for the response
 - If a phone call is preferred, please specify best the Date & Time for a returned call.

HOW TO SWITCH FROM CAREGIVER TO RESPONSIBLE PARTY

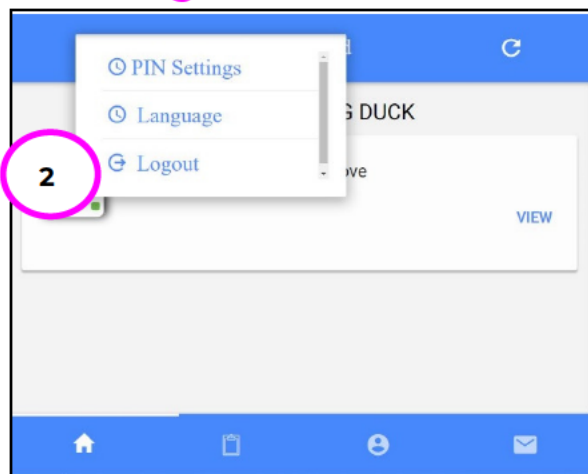
To switch roles, you will need to Log Out of the Cashé FMS EVV app and Log back in. Then select the Employee role.

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 CashSupport@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 the best Date & Time for a returned call.

WHAT IS MY PIN?

You should have set up your PIN initially when you logged in. Reference [HOW TO SET UP A PIN FOR THE FIRST TIME](#) if you have not done so yet.

If you want to Change your PIN, Reference [HOW TO CHANGE YOUR PIN](#).

If you have Forgotten you PIN. Reference [HOW TO RESET YOUR PIN](#).

You can also submit an email ticket to our technical team at CasheSupport@lifeworks.org.

Include the following:

- Description of why you are reaching out
- 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.

GEOFENCE INFORMATION

On December 1, 2023, DHS will change the geofence range for EVV providers. A geofence is a virtual perimeter around a specific point. For EVV, that point is the home address of the person receiving services.

DHS intends to reduce the approved EVV geofence to 500 feet. This geofence data is only captured during the initial clock-in at the start of a shift, and when clocking out at the end of a shift, it does not track location during the duration of a shift while an employee is working.

To meet the DHS requirement for the geofence reduction, the EVV app and the web-based platform were updated on Wednesday, November 15, 2023. **This update will only apply changes to the caregiver login; there are no changes to the responsible party logins.**

The reduction in the geofence does not limit the provision of services while the participant is accessing their community.

Per the [DHS Live-In Caregiver Policy](#), live-in caregivers do not have to interact with the EVV system in real-time but must record their time daily on the date they worked.

Non-live-in caregivers must use their own devices to clock in and out in real-time daily at the start and end of each shift.

Please note: Currently, DHS does not require Safe at Home members or workers to participate in EVV. DHS is determining appropriate alternatives to ensure that protected information remains confidential.

[EVV Policy](#)

DHS EVV Page: [Electronic Visit Verification](#)

DHS eList: [eList Announcement](#)

If you have additional questions, please reach out to your service coordinator.

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 Approve or Reject timecards but there is no reason to keep it open.

I ACCIDENTALLY APPROVED A TIME ENTRY; HOW DO I GET IT CORRECTED?

Please submit an email ticket to our technical team at

CashSupport@lifeworks.org

Include the following:

- Description of why you are reaching out (include date & time)

- Your Full Name
- Your Username
- Name of Employee
- 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.

HOW DOES MY EMPLOYEE ENTER TIME?

Your Employee will log in to their CASHÉ FMS EVV Profile to Clock In at the beginning of their shift and Clock Out at the end of their shift. They can reference the Employee User Guide for CASHÉ FMS on our website <https://www.lifeworks.org/timekeeping/> for more information.

If you have further questions, please submit an email ticket to our technical team at CashSupport@lifeworks.org

Include the following:

- Description of why you are reaching out
- Your Full Name
- Your Username
- Name of Employee
- 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.

DELETE A TIME ENTRY

If you or your Employee would like to delete a time entry, please submit an email ticket to our technical team at CashSupport@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 Employee
- 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

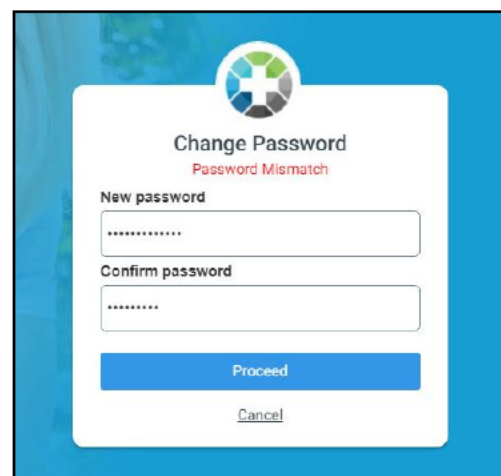
Below are images of possible error messages while using CASHÉ FMS EVV along with instructions for how to troubleshoot them.

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.

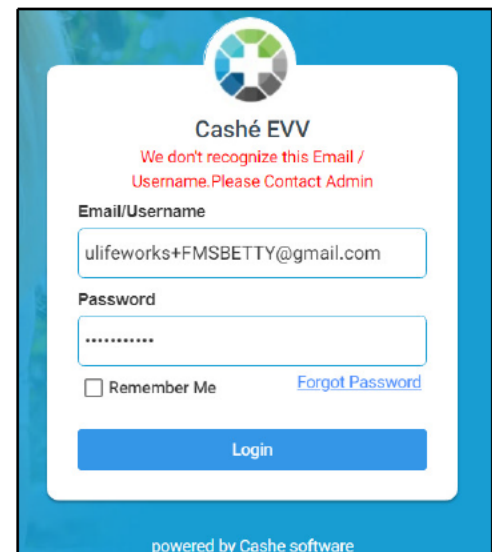


We don't recognize this Email/Username. Please Contact Admin

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@cashsoftware.com) and follow the steps for setting up your information.
2. Send an email ticket to our technical team at CashSupport@lifeworks.org



Cashé EVV

We don't recognize this Email / Username. Please Contact Admin

Email/Username

ulifeworks+FMSBETTY@gmail.com

Password

☐ Remember Me [Forgot Password](#)

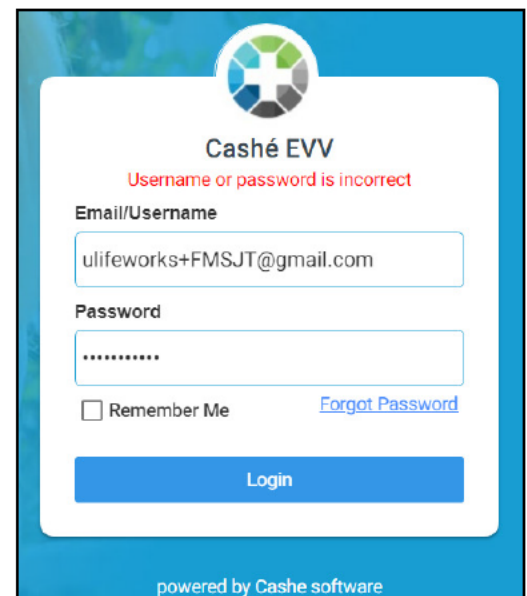
Login

powered by Cashe software

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.



Cashé EVV

Username or password is incorrect

Email/Username

ulifeworks+FMSJT@gmail.com

Password

☐ Remember Me [Forgot Password](#)

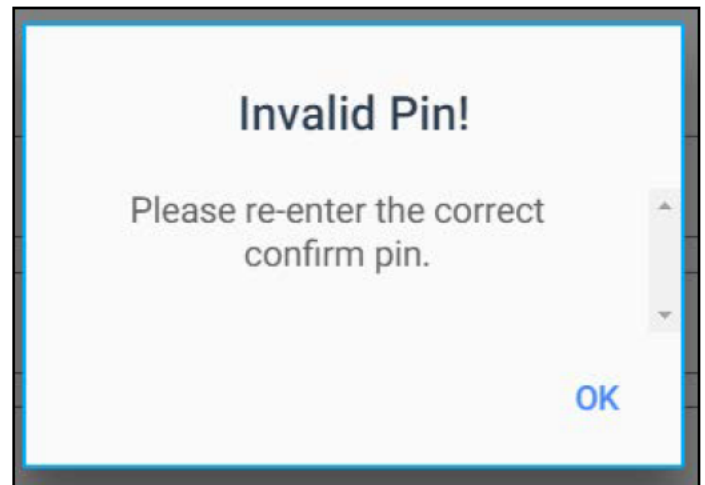
Login

powered by Cashe software

Invalid Pin! Please re-enter the correct confirm pin.

Reason: When CHANGING PIN the numbers do NOT match.

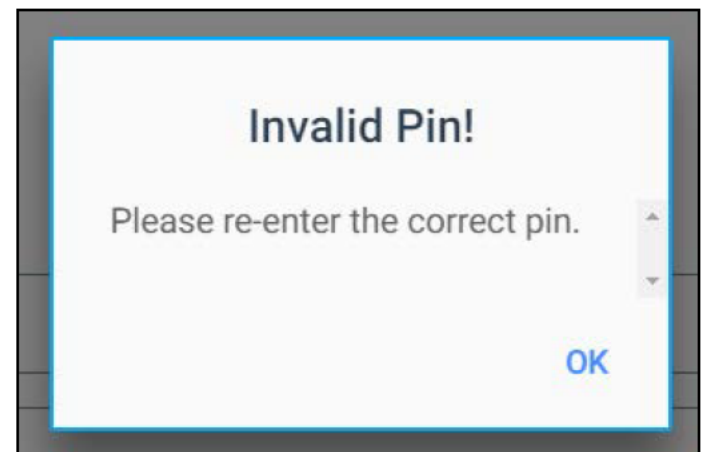
Solution: Slowly reenter the numbers in each field



Invalid Pin! Please re-enter the correct pin.

Reason: When RESETTING PIN (Forgot PinCode) the numbers do NOT match

Solution: Slowly reenter the numbers in each field



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
 - 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 Employee (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 CONTACT INFORMATION

Please submit an email ticket to our technical team at CashSupport@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 Employee (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 EVV RELATED QUESTIONS?

Please contact our technical team by sending an email ticket to CashSupport@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 Employee (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 Support Manager User Guide to your device for future reference OR for the most recent version go to the following website <https://www.lifeworks.org/timekeeping/>.