

RESPONSIBLE PARTY USER GUIDE FOR PAVILLIO EVV FOR SHARED SERVICES

PCA, Homemaker, Individualized Home Supports, Respite, and Night Supervision



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ABOUT PAVILLIO EVV

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

Included in the 21st Century Cures Act, EVV is a federal requirement that begins December 1, 2021. EVV uses GPS to record the employee's location during clock in and clock out times. For more information, visit the Minnesota Department of Human Services and Medicaid.gov's EVV webpages: http://bit.ly/3oQZBjy and http://bit.ly/3oQZBjy and http://bit.ly/39zkp95.

Highlights of the new system:

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

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

Please have the following information available:

- Screenshot of error message (if applicable)
- · Description of why you are reaching out
- Your Full Name



- Your Username
- Name of Your Authorized Representative/Support Manager (if applicable)
- Name of Participant
- Preferred contact method for the response

SYSTEM FEATURES

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

1. Responsible Party Personal Identification Number (PIN)

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

2. Spending Summary (Service Utilization)

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

3. Timecard History

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



GETTING STARTED

SNAPSHOT OF NAVIGATION

What's Here?	Dashboard (Default View) Total Hours for current week Timecards started but NOT submitted to the Responsible Party	
What's Here?	Care History Timecards that NEED to be Approve Timecards you have already Approved	BUE
What's Here?	My Profile Your contact information Lifeworks has on file Navigation to Change Pin Navigation to Reset Pin	
What's Here?	Notifications Notification of an action that occurred.	Û
What's Here?	Menu Navigation to change the default language Navigation to Switch Client * Only Applicable is you are associated with multiple Participants* Navigation to Logout	



GLOSSARY OF TERMS

Pavillio Term(s)	Lifeworks Term(s)	Definition
Client Recipient of Care Care Recipient(s)	Participant	Individual who receives services
Caregiver	Employee	Individual who works with the participant
Responsible Party	Support Manager Authorized Representative	Individual responsible for managing the participant's services
Visit	Shift	Time spent working one to one with or for the participant
Session	Shared Services Shift	Time spent working with more than I participant at a time

MINIMUM SYSTEM REQUIREMENTS

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

- Phone/Tablet
 - o iPhone (iOS) Version IOS 10 or above
 - o Android Version Android 6.0 Marshmallow or above
- Website URL Computer
 - o Google Chrome Version 88.0.4324 or above



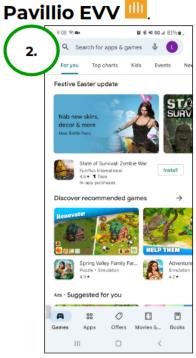
HOW TO ACCESS PAVILLIO EVV

ANDRIOD APP – PHONE AND TABLET

 On your phone or tablet, select the Play icon on your device to open the store.

NOTE: the Pavillio EVV app is free to download.

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



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



IOS/APPLE APP - IPAD AND IPHONE

1. On your iPad or iPhone, select the

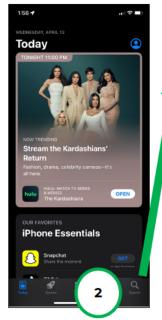
App Store icon on your device to open the store.

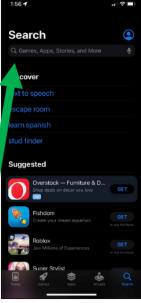
NOTE: the Pavillio EVV app is free to download.



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







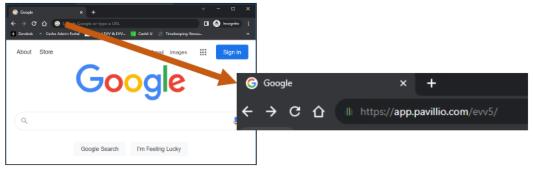


3. Tap the **GET** button to add the app to your device. The app will now appear on the home screen of your device.

WEBSITE URL - COMPUTER

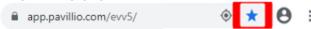
We recommend using Google Chrome as your browser for accessing Pavillio EVV. (To download Chrome, select the following website https://bit.ly/2QCJQ0p)

1. To access Pavillio EVV on your computer, type the following website https://app.pavillio.com/evv5/



2. Optional

- a. Bookmark the Pavillio EVV website
 - i. On your computer, open Google Chrome.
 - ii. Enter the website's URL that you want to bookmark: https://app.pavillio.com/evv5/



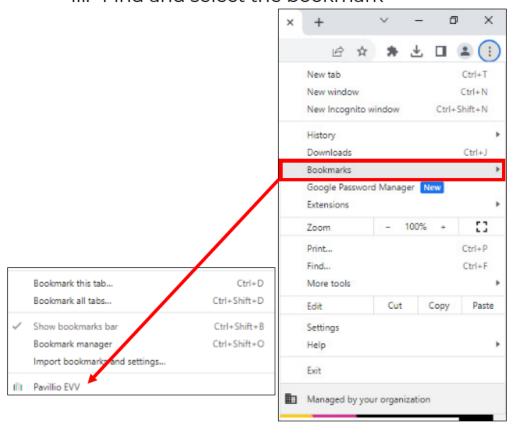
iii. To the right of the address bar, select the Star 🔯



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



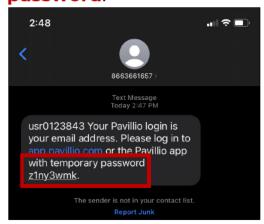
iii. Find and select the bookmark





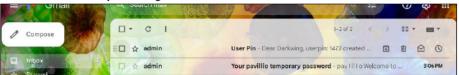
HOW TO LOG IN AND SET UP YOUR PASSWORD

- 1. You will receive 3 communications from Pavillio:
 - A text message to your mobile device with a temporary password.



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

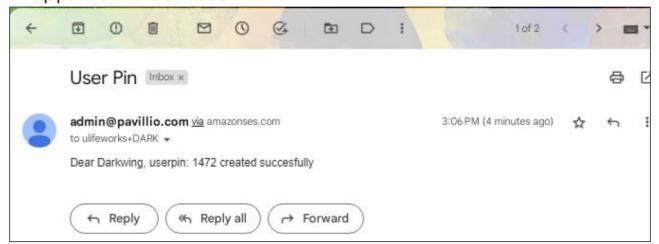
NOTE: Temporary Password will be valid for 30 days







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





- 2. Make note of the **temporary password**.
- In the email, select Please open the Pavillio EVV app (click [HERE]) to log in. <u>OR</u> Access the Pavillio EVV app on your preferred device
- 4. Log in to Pavillio EVV
 - a. Enter your email address into the in the **Email** box
 - b. Enter your temporary password into the **Password** box.
- 4. After you've entered your email and password, select the **Login** button.



- 5. You will be prompted to change your password. For your password to be accepted, it will need to include:
 - Lowercase letters (includes spaces)
 - At least an Uppercase letter
 - At least a Special character (!\$%^&*()_+|~=\`{}[]:";'<>?,?)
 - At least a number (0-9)
 - At least 8 characters in length



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





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

11. Select Login





HOW TO RESET YOUR PASSWORD

- Open Pavillio EVV on your preferred device. For assistance, refer to How to Access Pavillio EVV.
- 2. On the Log In screen, select Forgot Password





- 3. Enter your Email Address (if not already there) into the Email box
- 4. Select Send Verification Code



5. You will receive a message **Verification code sent to your** registered email

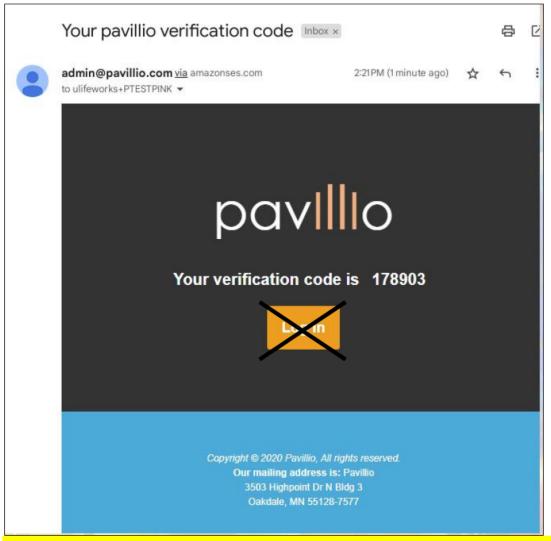




6. Log in to your email and open the message from Pavillio titled **Your pavillio verification code**.



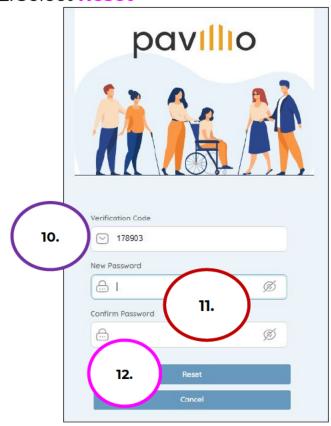
7. Make note of the verification code listed in the email.



8. Do not click on the orange Log In button in the message. Instead, to log in, access the Pavillio EVV app on your phone/tablet or go to the EVV website: https://app.pavillio.com/evv5/. For assistance, refer to How to Access Pavillio EVV.



- 9. You will be prompted to change your password. For your password to be accepted, it will need to include:
 - Lowercase letters (includes spaces)
 - At least an Uppercase letter
 - At least a Special character (!\$%^&*()_+|~=\`{}[]:";'<>?,?)
 - At least a number (0-9)
 - At least 8 characters in length
- 10.Enter the temporary password you were given via email and text message into the **Current Password** box.
- 11. Enter your chosen password into the **New Password** box and in the **Confirm Password** box
- 12. Select **Reset**





13. You will receive a message confirming that your password has been changed successfully.



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

13. Select Login

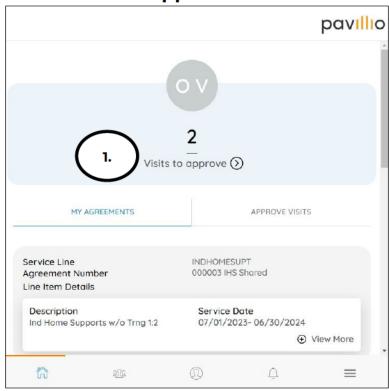




HOW TO USE PAVILLIO EVV

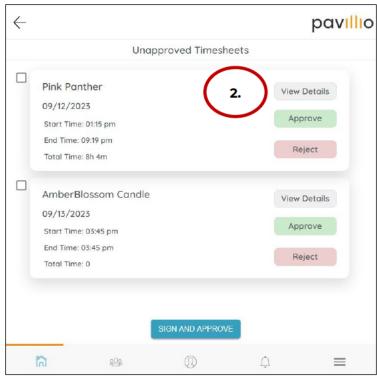
HOW TO REVIEW & APPROVE TIME ENTRIES

1. Select Visits to approve on the Dashboard





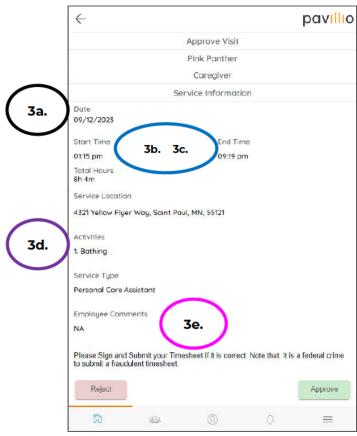
2. Select View Details on the timecard for you to review





- 3. Confirm the following are accurate for your Employee's shift:
 - a. Date
 - b. Start Time
 - c. End Time
 - d. Activities
 - e. (If Applicable) Employee Comments

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



4. To approve the time, continue to <u>Step 5</u>. To Reject the time, continue in the <u>How to Reject Time Entries</u> section.



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



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

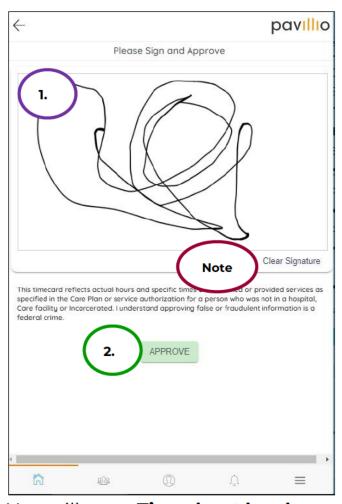
This option is only available if your Employee signs and submits their time at the end of their shift for you to approve.

1. You will use your touch screen or your mouse to **sign** <u>your</u> name inside of the text box.

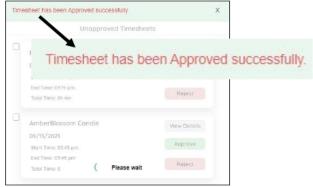
NOTE: If you make a mistake, you can clear your signature by selecting the **Clear Signature** text displayed at the bottom of the box

Select Approve





3. You will see a **Timesheet has been Approved successfully** message to confirm it has been submitted for Payroll.





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

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

1. Select the Responsible Party box; it will turn blue once selected

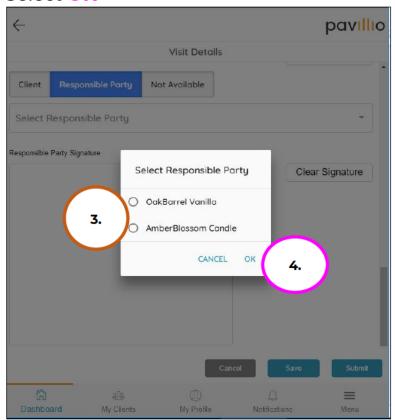


2. (If applicable) Select the Responsible Party's name from the **drop-down menu**





- 3. Select the name of the Responsible Party that is present
- 4. Select OK



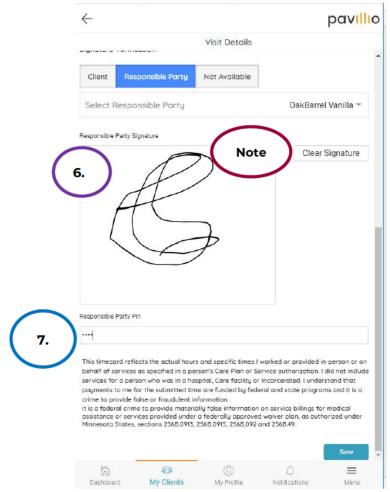
5. Your Employee will hand their device to the you



6. You will use their touch screen or their mouse to **sign** <u>your</u> name inside of the text box.

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

7. You will enter your 4-digit PIN

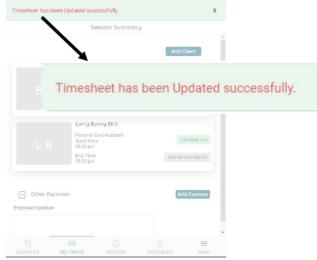




8. Your Employee will select Save



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

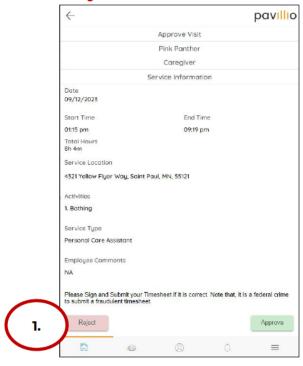


10. Repeat Steps 6-9 for each shift the Employee worked

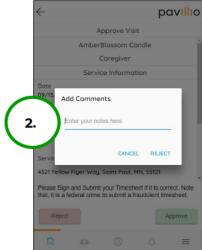


HOW TO REJECT TIME ENTRIES

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

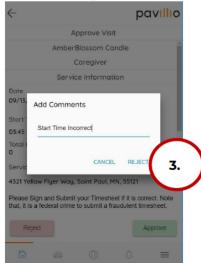


Enter your reason in the Add Comments box detailing why the visit is rejected.





3. Select Reject



4. You will see a **Timesheet has been Rejected successfully** message to confirm it has been sent back to the Employee to correct.



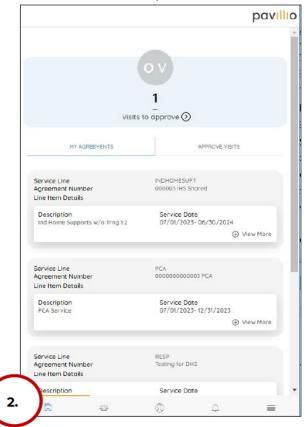


HOW TO ACCESS THE SERVICE UTILIZATION

1. Log in to Pavillio EVV

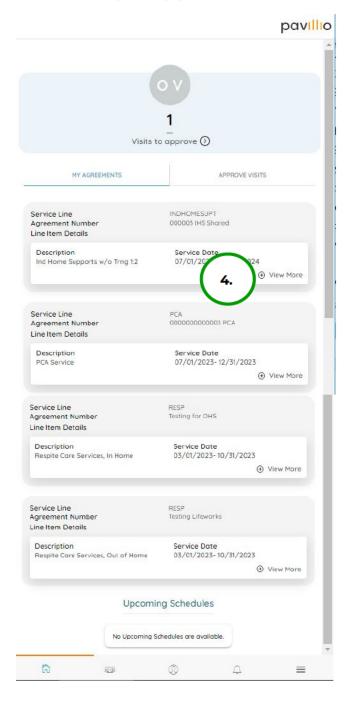


2. Select **Dashboard**, the 1st button from the left



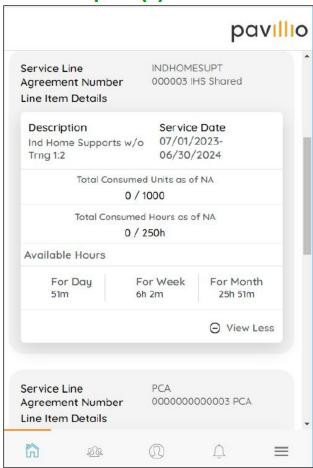


- 3. Review all lines within the budget
- 4. Select the plus (+) to View More details





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





COMMONLY ASKED QUESTIONS

WHO CAN I CONTACT TO ANSWER PAVILLIO EVV RELATED QUESTIONS?

Please contact our technical team by sending an email ticket to CasheSupport@lifeworks.org or calling 651-454-2732 and asking for Cashé Support. Please have the following information available:

- Screenshot of error message (if applicable)
- · Description of why you are reaching out
- Your Full Name
- Your Username
- Name of Your Responsible Party (if applicable)
- Name of Participant
- Preferred contact method for the response
 - If a phone call is preferred, please specify the best Date & Time for a returned call.

NOTE: For the most recent version go to the following website https://www.lifeworks.org/timekeeping/.

MISSING LOGIN INFORMATION

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



Include the following information:

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

CANNOT LOG IN

- 1. Confirm that your username and password have been entered correctly.
- 2. If you still cannot to log in, restart the device by turning it completely off and then turning the device back on. Attempt to log in again.
- 3. If restarting the device does not work, if you are on your phone or tablet uninstall and reinstall the Pavillio EVV app. If you are using your computer, use the Google Chrome browser to type the website https://evv.cashesoftware.com/app/.
- 4. If you still cannot log in, please submit an email ticket to our technical team at CasheSupport@lifeworks.org. Include the following information:
 - Screenshot of the error message
 - Your Full Name
 - Your Username
 - Preferred contact method for the response
 - If a phone call is preferred, please specify best the Date & Time for a returned call.



HOW TO CHANGE YOUR PIN

- Do you have the PIN from Pavillio that was emailed to you?
 - a. If Yes, move to Step 2.
 - b. If No, reference <u>COMMONLY ASKED QUESTIONS</u> > <u>HOW TO</u>

 RESET YOUR PIN
- 2. Select **My Profile**, the 3rd button located at the bottom of the dashboard.

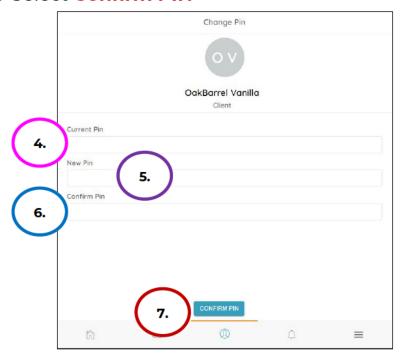




3. Select Change Pin

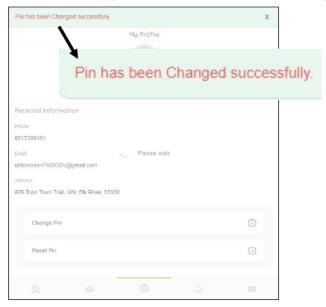


- 4. Enter the Pin from the email in Current Pin box
- 5. Enter your new 4-digit Pin in the New Pin box
- 6. Re-enter your new Pin in the Confirm Pin box
- 7. Select Confirm PIN



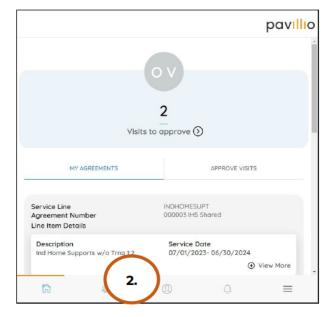


8. The message Pin has been Changed successfully will appear



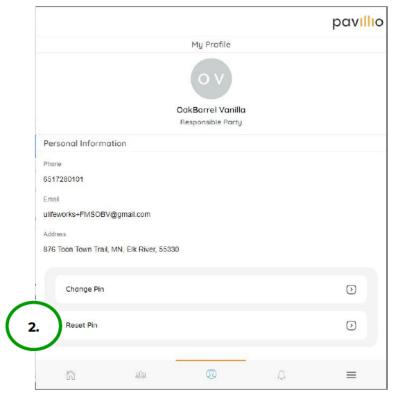
HOW TO RESET YOUR PIN

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

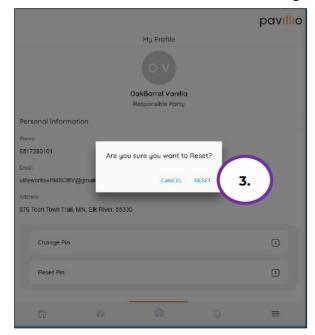




2. Select Reset Pin

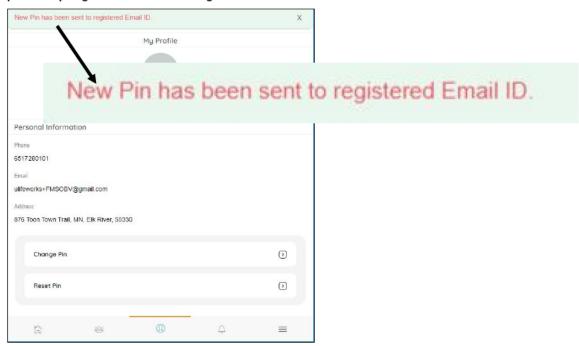


3. Select Reset when asked Are you sure you want to Reset?

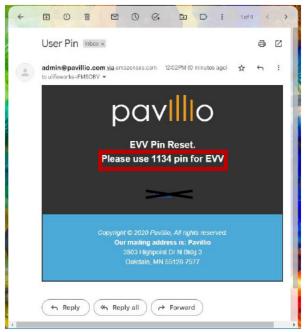




4. A message **New Pin has been sent to registered Email ID** will prompt you to check your email



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



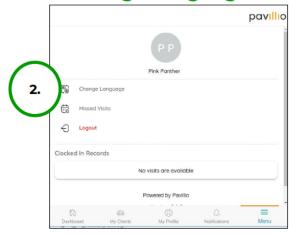


HOW TO CHANGE YOUR PREFERRED LANGUAGE

1. Select Menu

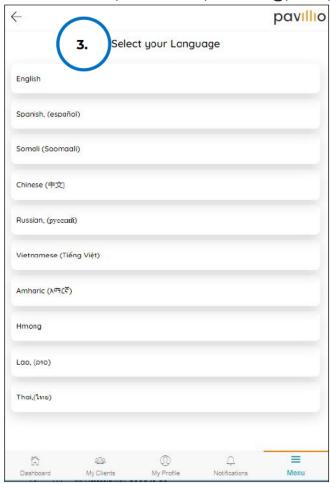


2. Select Change Language



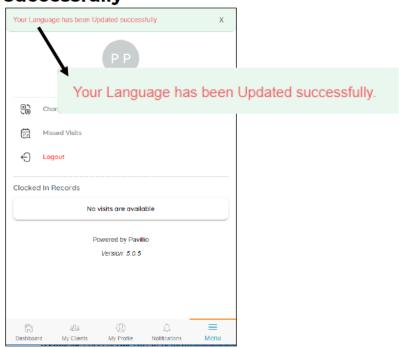


 Select your preferred language from the menu. Languages available include English, Spanish, Somali, Chinese, Russian, Vietnamese, Amharic, Hmong, Lao, Thai.





 There will be a message Your Language has been Updated successfully



NOTE: You may need to refresh for the language to updated.

DELETE A TIME ENTRY

If you or your Responsible Party would like to delete a time entry, please submit an email ticket to our technical team at

CasheSupport@lifeworks.org.

Include the following information:

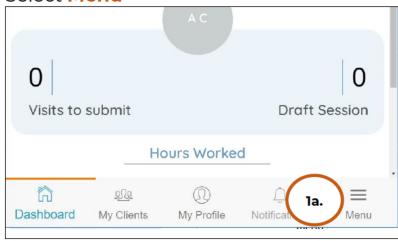
- Description of why you are reaching out
- · Screenshot of the time entry details
- Your Full Name
- Your Username
- Name of Your Responsible Party
- Name of Your Participant



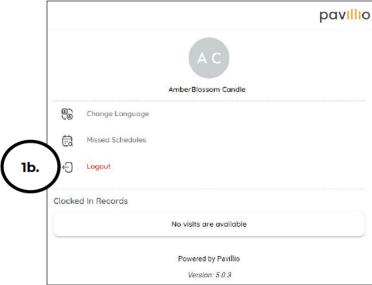
- Preferred contact method for the response
 - If a phone call is preferred, please specify the best Date & Time for a returned call.

HOW TO SWITCH FROM CAREGIVER TO RESPONSIBLE PARTY

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

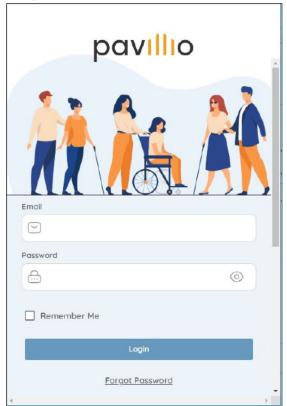


b. Select **Logout**

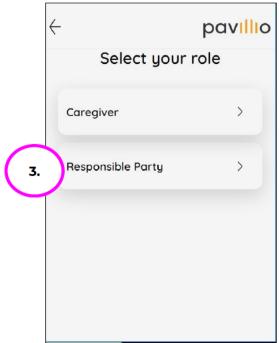




2. Log back in



3. Select the Responsible Party role





WHY DO I HAVE TO SELECT A ROLE?

This means you are listed as both a Caregiver AND Responsible Party for the Participant. When working with the Participant you will choose the **Caregiver** role to Clock In and Clock Out. When approving timecards for your Caregivers you will choose the **Responsible Party** role. For assistance with the Responsible Party role reference the Support Manager User Guide for Pavillio EVV located on our website https://www.lifeworks.org/timekeeping/.

IS THE PASSWORD THE SAME FOR THE RESPONSIBLE PARTY ROLE?

Yes, the password is the same for both the Employee AND the Responsible Party role.

If your password is NOT working for either login, please submit an email ticket to our technical team at CasheSupport@lifeworks.org.

Include the following information:

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



PARTICIPANT IS NOT LISTED

 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

<u>CasheSupport@lifeworks.org</u>

Include the following information:

- Screenshot of error the message on the Care Recipients screen showing the participant is missing
- Your Full Name
- Your Username
- Preferred contact method for the response
 - If a phone call is preferred, please specify the best Date & Time for a returned call.

WHEN IS PAYROLL DUE?

Go to our website https://www.lifeworks.org/fiscal-support/forms/ to reference our most recent Payroll Calendar.

HOW DOES MY EMPLOYEE'S TIMECARD GET SIGNED?

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



UPDATING YOUR CONTACT INFORMATION

Please submit an email ticket to our technical team at CasheSupport@lifeworks.org if you need to update your contact information (email, phone number, etc.). Include the following information:

- Your current information and the new information you need updated
- Your Full Name
- Your Username
- Name of Your Responsible Party (if applicable)
- Name of Your Participant
- Preferred contact method for the response
 - If a phone call is preferred, please specify the best Date & Time for a returned call.