

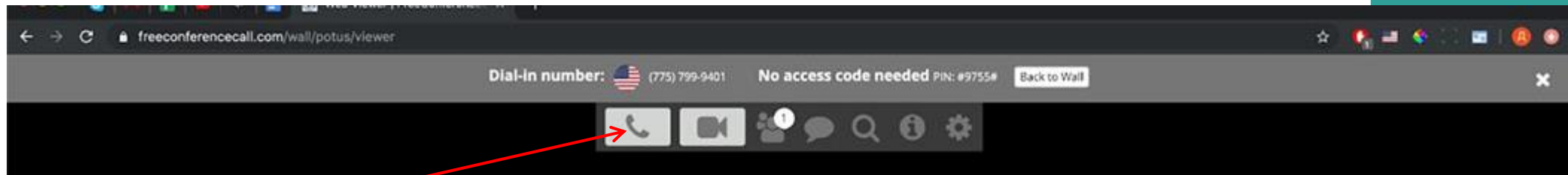


Electronic Visit Verification Training New Mexico - Agencies

Once you are on, you need to connect your speakers by clicking the Phone icon on the top of your screen. If that does not work for you, you can dial in using any phone.

Dial-in number (US): 605-313-5625

Access Code: 673022#.



Palco Electronic Visit Verification (EVV) Training

NM Agency EVV Training – Phase II

Summer 2021



Thank you for your time today!

01

Introductions

02

Welcome to Palco

03

Electronic Visit Verification (EVV)

04

Questions





Training Audience

- This training is focused on Agencies
 - Providers who serve DDW, Mi Via and Supports Waiver clients and perform **Homemaker, Respite, In-Home Living Supports, Customized In-Home Supports, or Personal Care services**
- This training is not for employers of record or employees of self-directed participants.





Training Guidelines

- All lines are muted and should remain muted.
- We will use the chat feature for questions and pause at designated times to answer them.
- Please keep questions focused to the topic being discussed.



Hello, it's my pleasure to be here!

Cody Waits, Training Manager



→ **EVV Implementation Lead and Training Manager**

→ **Three years providing product development in Medicaid Financial Management Services long-term home and community based care waivers, consumer-directed programs, and case management.**

Palco Mission



We serve people. We provide services that enable individuals to live independent lives, where they are empowered to make their own choices about what's best for them. We embrace diversity of thought and the promise of new ideas, honed by experience and enhanced by technology.





Leader in Self-Direction



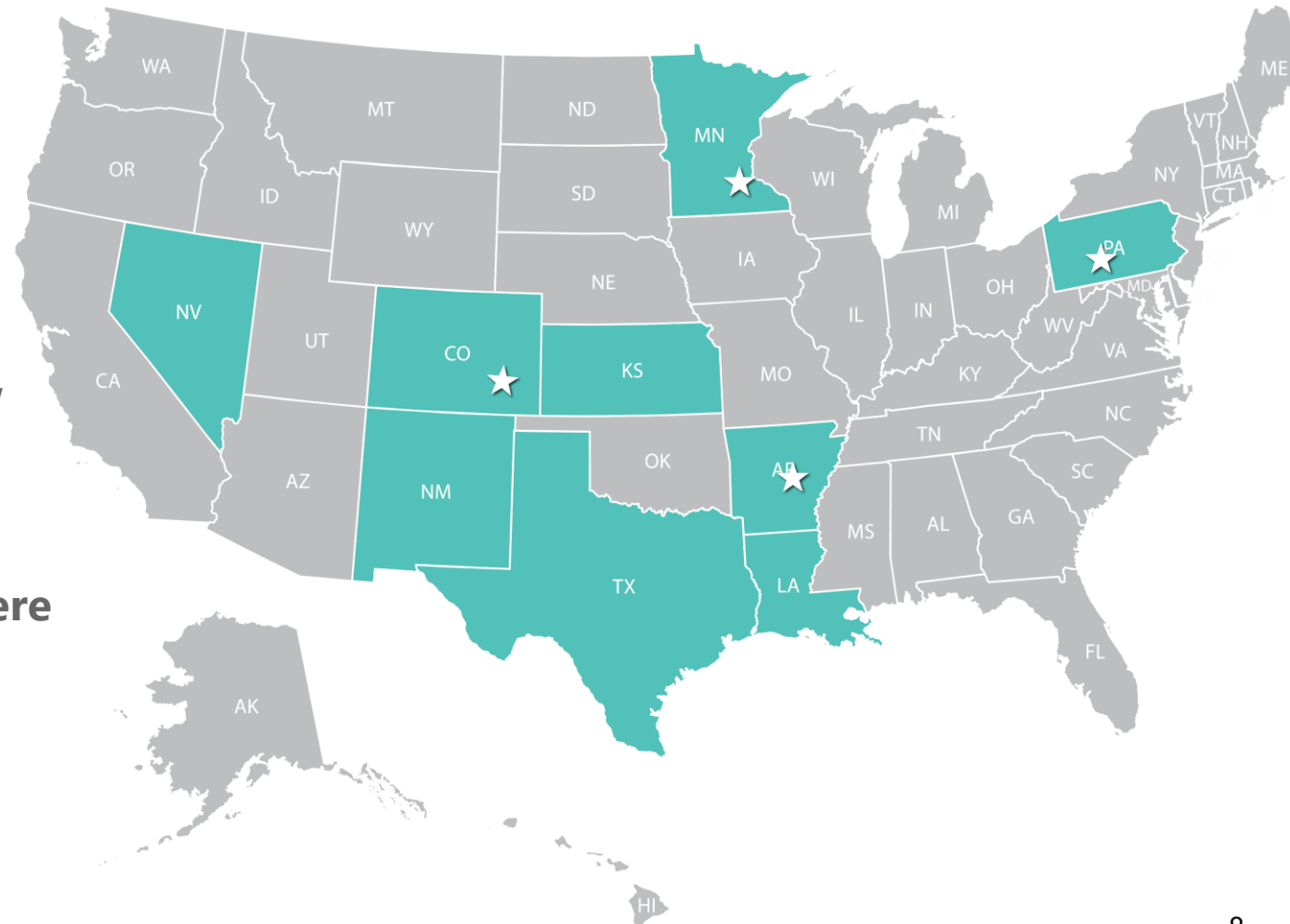
National Industry leader providing premium FMS services to 9 states and growing.



Palco has been at the forefront of pioneering technologies to support public and HCBS programs, such as self-direction in the late 90s, VDHCBs in the mid-2000s, and now EVV.



Focused on industry standards and compliance, particularly in EVV, where we've implemented across multiple states.





There is freedom of choice in home-based care.

Electronic Visit Verification (EVV)



What is EVV?

- Electronic visit verification (EVV) is a technology solution which electronically verifies that home and community-based services are actually delivered to people needing those services by documenting the precise time service begins and ends.





Why is EVV Required?

- Implementing EVV is a federal requirement. Section 12006 of the 21st Century Cures Act requires all state Medicaid agencies implement an EVV solution to manage their Personal Care services by January 1, 2021, and for all Home Health services by January 1, 2023.





What does EVV verify?

EVV captures 6 points of data:

- **Type** of Service performed
- **Individual receiving** the service
- **Date** of the service
- **Location** of the service
- **Individual providing** the service
- **Time** the service begins and ends





Statewide EVV Solution

- Palco has partnered with FiServ to provide our clients with one of the best EVV platforms that exists nationwide.
- AuthentiCare by FiServ is compliant with the Cures Act, user friendly, and secure.
- **All providers must use AuthentiCare for Medicaid Programs.** If you are currently using an EVV system you will have to switch systems.





What Services Require EVV?

If you use any of the services listed below, you will be required to use EVV starting January 1, 2021:

- **99509/99509-E – Homemaker/Personal Care Services**
- **T1005SD/T1005SD-E - Respite Services**
- **T2033 - In Home Living Supports**
- **T1005HB - DD Waiver Respite**
- **T1005HBHQ – DD Waiver Respite – Group**
- **S5125HB – DD Waiver Customized In Home Supports – Family Natural Supports**
- **S5125HBUA – DD Waiver Customized In Home Supports – Independent Living**

All other services are not required to go through AuthentiCare.



QUESTIONS?



Enter your questions in the CHAT box, we will answer as many as we can.





AuthentiCare Mobile Application



What is the mobile application?

- **AuthentiCare** Mobile Application is a smart phone application that uses the cellular GPS capabilities on your smart phone device to capture your location as well as the 6 points of data required to comply with EVV.



Download the application

Download the AuthentiCare App

Step 1: Go to the App Store on your mobile device.

Step 2: Tap on **Search**

Step 3: In the search bar, type "**AuthentiCare**"

Step 4: Download the app- "**AuthentiCare 2.0**".

Step 5: Complete the download and tap to open.

Tap Allow to access this device's location and Allow to make and manage phone calls.

- The minimum software version for iOs is 13.0 and Android is 6.0.
- The app will display in Spanish if the device is set up with Spanish as the default/preferred language.





Initial Setup- Employees



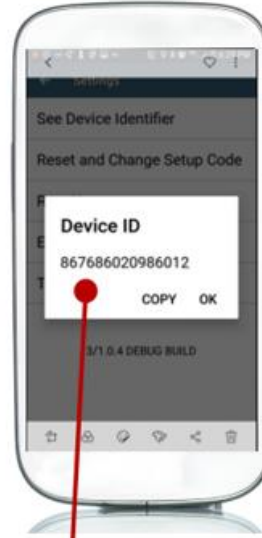
Once downloaded, enter the **Setup Code** provided to you by Palco.



Next, obtain your device ID. Click **Settings** at the bottom right of the login screen.



Click **See Device Identifier** from the menu options



Device ID will be used by the Agency Program Administrator to set up the Employee in AuthentiCare website.

SET UP CODE FOR NM = **PALCONMPRD**



Initial Setup- Employees

Worker Entity Settings

* Indicates a required field.

ID: _____
PIN: _____

* First Name: _____
Middle Name: _____
* Last Name: _____

Company Name: _____
SSN: _____
FID: _____
Gender: _____
Birth Date: _____
Email Address: _____
Begin Date: MM/DD/YYYY _____
End Date: MM/DD/YYYY _____
Language: _____
Status: Active

* External Worker ID: _____

Worker Services:
Mi Via Homemaker/Direct Support
Mi Via In Home Living Supports
Mi Via Respite
DD Waiver Respite

* Mobile Enabled: Yes No
Mobile Locked: Yes No
Password: _____
Worker Must Change Password:
Mobile phone number: _____
Device ID: _____
Office Phone: _____

Add Provider
Provider: Best Health Agency Inc **Delete**

Save **Cancel**

Entity Addresses/Phones

Add Address
Add Phone

Holidays / Days Off

Add Holiday MM/DD/YYYY **Add** **Remove**
From Date To Date
MM/DD/YYYY MM/DD/YYYY **Add**

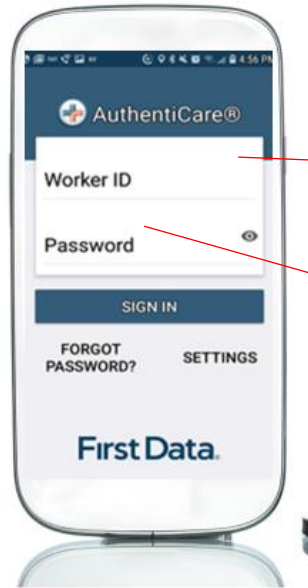
Work Hours

Choose if the entity will use the default business hours (Default), if the entity has the day off (Off) or if the entity has a custom hours (Custom).

			Start Time	End Time
Sun	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom	_____
Mon	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom	_____
Tue	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom	_____
Wed	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom	_____
Thu	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom	_____
Fri	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom	_____
Sat	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom	_____

Device ID will be used by the Agency Program Administrator to set up the Employee in AuthentiCare website.

Logging In

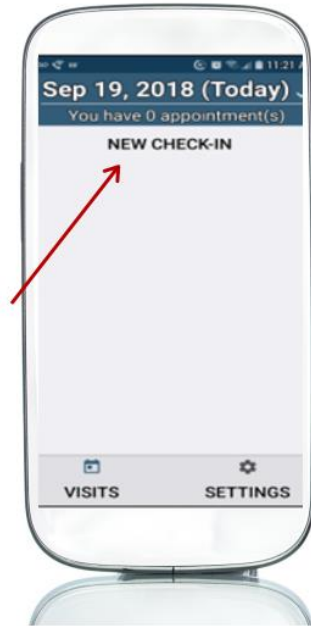


Worker ID: Your AuthentiCare ID

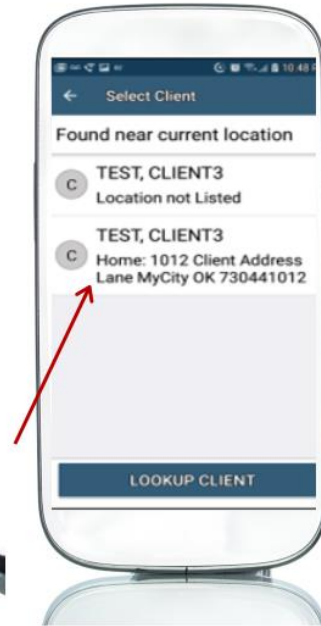
Password: Set by the Agency Program Administrator during set up.

Note: Employee should be prompted to set a unique, secure password during the first log in.

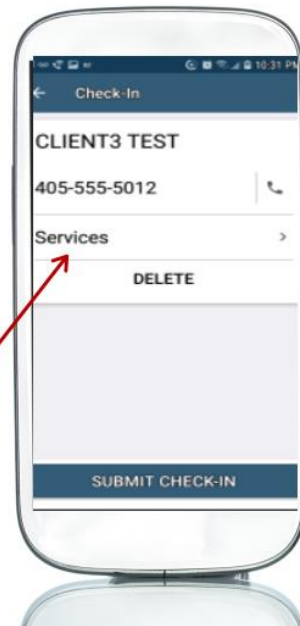
Clocking In



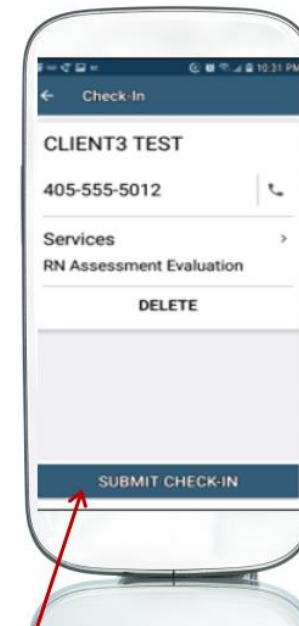
1. Click on "New Check-In"



2. Choose the client from the list of clients. If the client is not found, click "Lookup Client" and follow the steps.

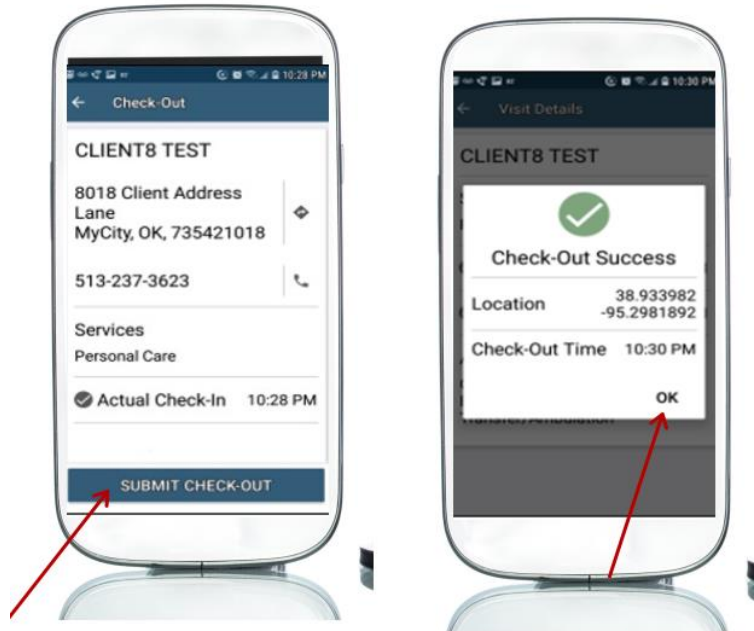


3. Click on "Service" and select the service you are providing for that shift



4. Click on "Submit Check-In" and click "OK"

Clocking Out



1. At the end of the shift, login to the app again and select your active visit followed by "submit check-out"

2. Check-Out success screen will display, click "OK"

GPS coordinates are collected only during the Check-in and Check-out process. They are not collected at any other point of the visit.

In a limited service zone, all Check-In/Check-Out data is stored in the mobile app until the mobile device enters a location of internet service. Once that occurs, all data is then pushed to AuthentiCare.



No Cell Service

- In a limited-service zone, all check in/out data is stored in the mobile application until the device enters a location of internet service. Once that occurs, all data is then pushed to AuthentiCare.
- This is known as “Frontier Mode”.
 - Data is saved in Frontier Mode for 7 days
 - You should connect to internet service within this period to ensure all data is pushed to AuthentiCare
- Always clock in/out even if you are in a bad coverage area.

QR Code Functionality



- Who is impacted?
 - Only impacts workers who:
 - Are temporarily using a smartphone that is not theirs **OR**
 - Share a smartphone with other workers (i.e. "shared device")
 - Workers who have their profile set up in the AuthentiCare Admin portal with their smartphone's device ID **will not** be impacted by this change and can follow the existing login process for the mobile application.

QR Code Functionality



- Why is this being implemented?
 - For security purposes, AuthentiCare validates two pieces of information when workers log into the AuthentiCare 2.0 application.
 1. Username and password
 2. Device ID of the smartphone they are using to log in
 - If credentials are correct AND device ID matches, worker will be able to log in.
 - If credentials are correct BUT device ID does not match (either because the worker doesn't have one or a different device ID exists in their AuthentiCare profile, the system will prompt them to scan the QR code.

QR Code Functionality





- Who issues the QR code?
 - Anyone with access to the AuthentiCare Admin portal AND can edit that caregiver's profile can generate the QR code.
- From AuthentiCare Admin portal home screen, search for worker.
 - Brings up Worker Entity page.
 - QR code is new button located under Mobile Enabled section of Worker Entity page (see next slide for screenshot).



Worker Entity Settings

* Indicates a required field.

ID: 25892
PIN:
* First Name: Jane
Middle Name:
* Last Name: Doe
Company Name:
SSN:
FID:
Gender:
Birth Date: MM/DD/YYYY
Email Address:
Begin Date: 06/01/2014
End Date: MM/DD/YYYY
Language: English
Status: Active
* Mobile App Mode: Standard
External Worker ID: 12345
Receive Stipends: No
Worker Services:
* Mobile Enabled: Yes No
Generate QR Code 
* Mobile Locked: Yes No
Password:
Worker Must Change Password:
Mobile phone number: 9160003134
Device ID:
Office Phone: 9162223008

Add Provider
Provider: TEST PROVIDER 108  **Delete**

Save **Cancel** **Delete**

Entity Addresses/Phones

Add Address
Add Phone

Holidays / Days Off

Add Holiday MM/DD/YYYY **Add** **Remove**
From Date To Date
MM/DD/YYYY MM/DD/YYYY **Add**

Work Hours

Choose if the entity will use the default business hours (Default), if the entity has the day off (Off) or if the entity has a custom hours (Custom).

			Start Time	End Time	
Sun	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom		
Mon	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom		
Tue	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom		
Wed	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom		
Thu	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom		
Fri	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom		
Sat	<input checked="" type="radio"/> Default	<input type="radio"/> Off	<input type="radio"/> Custom		

QR Code Functionality



- From Worker Entity page, click “Generate QR Code”.



- Ability to save as a PDF or print the QR code
- QR code is unique to the worker. Any time a new QR code is generated for that worker, the previous code will not be usable.
- QR code can be used as many times as needed and will not expire.

QR Code Functionality



- How does the worker scan the QR code?
 - Worker will follow the process they currently use to log in
 - Enter worker ID and password
 - If worker does not have a device ID associated with their AuthentiCare profile OR the worker is temporarily using a different smartphone to log in, the mobile application will prompt them to scan the QR code using their smartphone's built-in camera.
 - The log in process is completed after scanning the QR code. This will allow the worker to check in and out for EVV services just like they do now.



QUESTIONS?



Enter your questions in the CHAT box, we will answer as many as we can.





AuthentiCare Provider Admin Role



Provider Admin Role

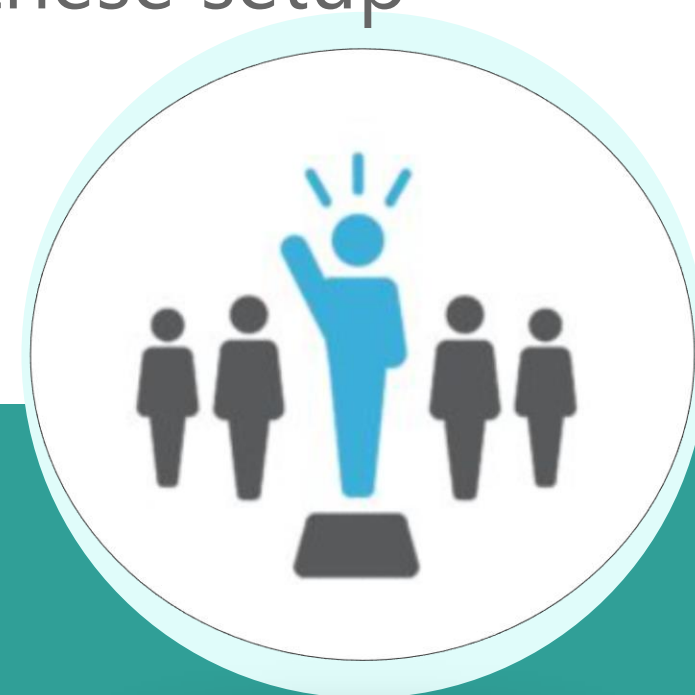
- AuthentiCare Admin site will be used to:
 - Add Workers
 - Create Logins
 - Reset Passwords
 - Control who has access to the agency account





Provider Admin Role

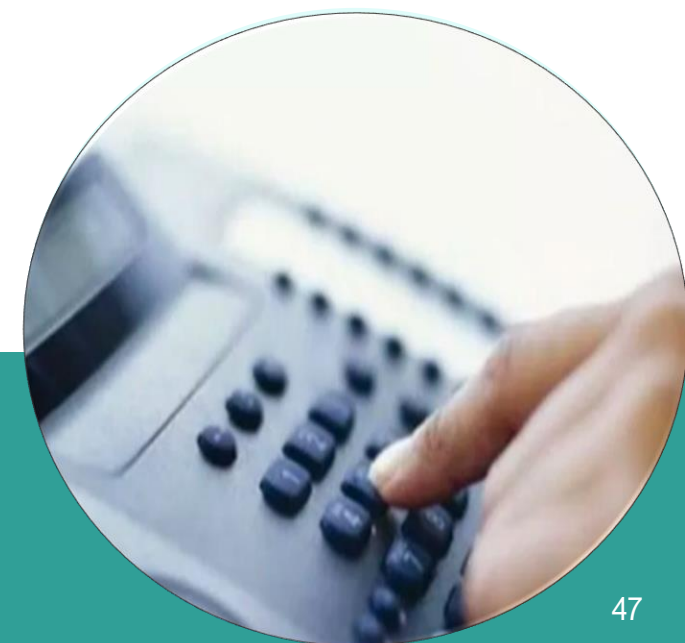
- Each agency will have their own admin AuthentiCare account which they will use to manage their agency.
- Provider Administrator can set up additional Provider Administrators to assist with these setup items.





Worker Registration

- Provider Administrators will set up their workers in AuthentiCare and be responsible for maintaining workers, including setup.
- Scheduling feature will not be used, All visits will be captured as an unscheduled visit.
- User Guide for Provider Agencies:
<https://palcofirst.com/new-mexico/>
 - EVV Resources for Agency Based Provider
 - User Guides/FAQs





Worker Registration Cont.

- 1) Log into AuthentiCare
- 2) On the main page, hover over "Create" and select "New Worker" or click on the "Worker" link in the Entities section:

The screenshot displays the AuthentiCare Palco New Mexico web application interface. At the top, the 'First Data' logo is on the left, and 'AuthentiCare® Palco New Mexico' is on the right. A navigation bar includes links for Home, Create, Reports, Dashboards, Visits, My Account, Custom Links, and Logout. The user is logged in as 'alejandro_palconm@acr.com'.

The main content area is divided into two columns. The left column is titled 'Entities' and contains a dropdown menu with options: 'New Claim', 'New Client', and 'New Worker'. A red arrow points to 'New Worker'. Below this is an 'Add New >' link for 'Client Worker', with another red arrow pointing to it. There are also fields for 'Entity Type' and 'Search', and a 'Go!' button.

The right column is titled 'Claims' and contains 'Add New >' links for 'Claim (Standard)' and 'Claim (Express)'. It features a 'Claim ID' field with 'Go!' and 'Clear' buttons. Below are fields for 'Claim Status', 'Claim Start', and 'Claim End', each with a calendar icon. There are also fields for 'Service', 'Authorization ID', 'Client', 'Provider', 'Worker', 'Payer', 'Procedure Code', and 'User Option'. A checkbox for 'Include Inactive Claims?' is present, along with 'Go!' and 'Clear' buttons.

The bottom section is titled 'Services and Authorizations' and includes a 'Search Type' dropdown with 'Service' and 'Authorization' (selected) options. It contains multiple input fields for 'Service', 'Authorization ID', 'Service Type', 'Authorization Start', 'Authorization End', 'Client', 'Provider', 'Worker', 'Payer', 'Service Period', and 'Procedure Code', along with 'Go!' and 'Clear' buttons.



Worker Registration Cont.

3) The "Worker Entity Settings" page will display

4) Complete all the required fields for the worker (marked with an asterisk), including the worker's address and phone number, located on the top right corner.

5) The sections titled "Holidays/Days Off" and "Work Hours" are not required and can be disregarded.

6) If the worker will be using the mobile application, you will need to mark yes on the "mobile enabled"

The screenshot shows the 'Worker Entity Settings' page. A green arrow points to the asterisk on the 'First Name' field. Another green arrow points to the 'Mobile Enabled' section. The page is divided into several sections:

- Worker Entity Settings:** Contains fields for ID, PIN, First Name, Middle Name, Last Name, Company Name, SSN, FID, Gender, Birth Date, Email Address, Begin Date, End Date, Language, Status (Active), External Worker ID, Worker Services (dropdown menu), Mobile Enabled (radio buttons), Mobile Locked (radio buttons), Password, Worker Must Change Password (checkbox), Mobile phone number, Device ID, and Office Phone. Buttons for 'Add Provider' and 'Delete' are at the bottom.
- Entity Addresses/Phones:** Contains 'Add Address' and 'Add Phone' buttons.
- Holidays / Days Off:** Contains a table for adding holidays with columns for 'Add Holiday', 'From Date', 'To Date', and 'Add'.
- Work Hours:** Contains a table for setting work hours with columns for 'Day', 'Default', 'Off', 'Custom', 'Start Time', and 'End Time'.

At the bottom of the page, there are 'Save' and 'Cancel' buttons.



Worker Registration Cont.

7) The administrator will need to setup a new password that follows the password requirements including lowercase, uppercase, symbols and numbers and mark that the worker must change password.

8) Fill the rest of the fields including mobile phone number, Device ID, and office phone number

9) Once the fields have been completed, press the "Save" button at the bottom of the screen. Upon pressing Save, AuthentiCare assigns that worker a unique AuthentiCare Worker ID.

Worker Entity Settings
* Indicates a required field.

ID:
PIN:
* First Name:
Middle Name:
* Last Name:
Company Name:
SSN:
FID:
Gender:
Birth Date:
Email Address:
Begin Date:
End Date:
Language:
Status: Active
* External Worker ID:
Worker Services:
* Mobile Enabled: Yes No
Mobile Locked: Yes No
Password:
Worker Must Change Password:
Mobile phone number:
Device ID:
Office Phone:
Add Provider
Provider: Best Health Agency Inc **Delete**
Save **Cancel**

Entity Addresses/Phones
Add Address
Add Phone

Holidays / Days Off

Add Holiday **Add** **Remove**
From Date To Date
 Add

Work Hours
Choose if the entity will use the default business hours (Default), if the entity has the day off (Off) or if the entity has a custom hours (Custom).

	Default	Off	Custom	Start Time	End Time
Sun	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Mon	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Tue	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Wed	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Thu	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Fri	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>
Sat	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>



Maintaining Workers

- Instructions for managing workers such as creating logins, terminate workers, resetting passwords, and managing who has access to the agency account will be available in the User Guide.
- User Guide for Provider Agencies:
 - Located under EVV Resources for Agency Based Provider
 - User Guides/FAQS



RESOURCES

<https://palcofirst.com/new-mexico/>

- EVV Frequently Asked Questions (FAQ)
- EVV User Guide NM - Telephony
- EVV User Guide NM – Mobile App
- PowerPoint Training Slides
- Training Recording
- Agency AuthentiCare User Guides





Next Steps

- Agencies should ensure employees are registered with the worker's device ID in AuthentiCare to use the mobile application.
- Agency Administrators should relay information and instructions for the mobile application.
- The go-live date for the mobile application is **8/2/2021** for agencies only.





QUESTIONS?



Enter your questions in the CHAT box, we will answer as many as we can.



ADDITIONAL SUPPORT

If you have questions, please contact Consolidated Customer Service Center at **1-800-283-4465** and press "5" for assistance.

Please visit the Palco website for EVV Mobile App resources! <https://palcofirst.com/new-mexico/>



For more information about Palco visit:

<https://www.palcofirst.com/>

Thank You for your time!

