

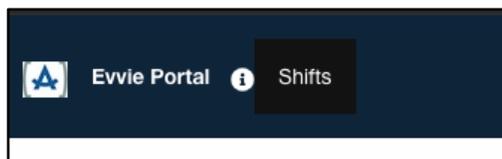
Batch Shift Entry

Batch Shift entry allows users to enter up to seven manual shifts from the same screen into evvie Portal at the same time. **Please note that batch entered manual shifts are not EVV-compliant and should only be used when the Worker could not use the evvie mobile app or IVR to record a shift.** Batch entry of manual shifts can also be used when the service provided by the Worker does not require evv. For instructions on approving a batch of shifts, please see [Batch Approvals](#).

Creating Batch Shifts

These instructions are for users with a **Worker, Participant, or Representative** role.

1. **Desktop:** After logging in to evvie Portal, click on Shifts in the menu bar at the top of the screen.

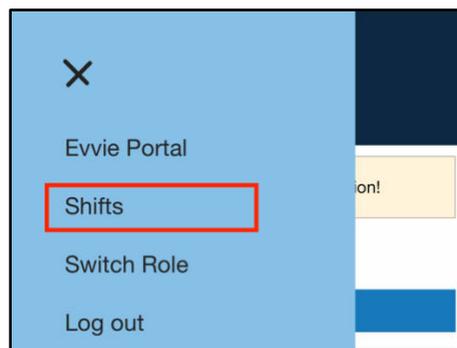


Shift Button in Header (Desktop)

Mobile: After logging in to evvie Portal, click on the menu icon (three bars) in the upper left corner of the screen. Then click on Shifts in the slide-in menu.

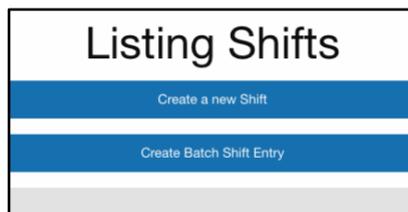


Menu Icon (Mobile)



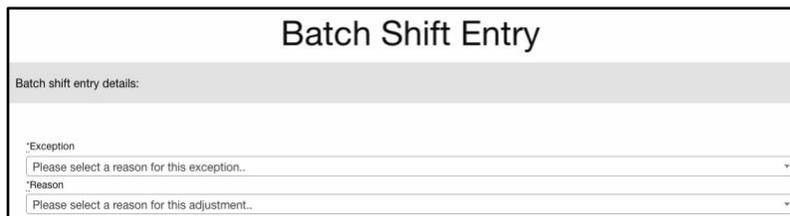
Shifts in Slide in Menu (Mobile)

2. On the next page, click the blue Create Batch Shift Entries button below Listing Shifts.



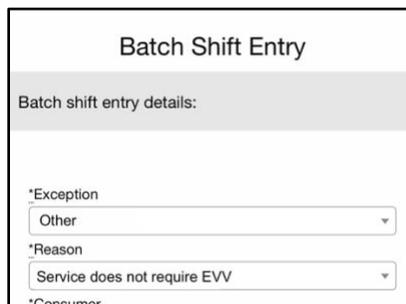
Create Batch Shift Entries Button (Desktop & Mobile)

3. Select an **Exception**, and a **Reason** for the manual batch entry.



The screenshot shows the desktop version of the 'Batch Shift Entry' form. Under the 'Batch shift entry details:' section, there are two dropdown menus. The first is labeled '*Exception' with the placeholder text 'Please select a reason for this exception...'. The second is labeled '*Reason' with the placeholder text 'Please select a reason for this adjustment...'.

Exception and Reason Selection (Desktop)



The screenshot shows the mobile version of the 'Batch Shift Entry' form. Under the 'Batch shift entry details:' section, the '*Exception' dropdown is set to 'Other' and the '*Reason' dropdown is set to 'Service does not require EVV'. A '*Consumer' label is visible below the reason dropdown.

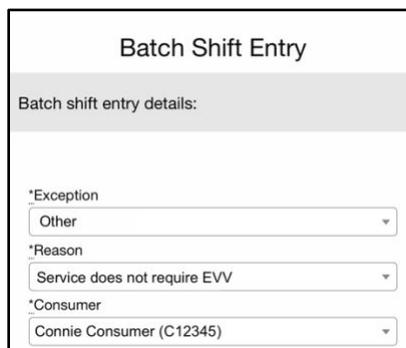
Exception and Reason Selection (Mobile)

4. The next field to select will be either Consumer/Participant or Employee. If you are a Worker, you will need to select the Participant you worked for. If you are a Participant, you will need to select the Worker you are entering shifts for. Representatives will need to select the Participant from the Consumer dropdown first, then a Worker from the Employee dropdown.



The screenshot shows the desktop version of the 'Batch Shift Entry' form. Under the 'Batch shift entry details:' section, there are four dropdown menus: '*Exception' (Employee did not select a service), '*Reason' (Mobile device battery died), '*Employee' (Test Employee (E00534)), and '*Consumer Enrollment' (Please select an enrollment...). Below these fields is a blue 'Add Shifts to Batch' button and a 'Cancel' link.

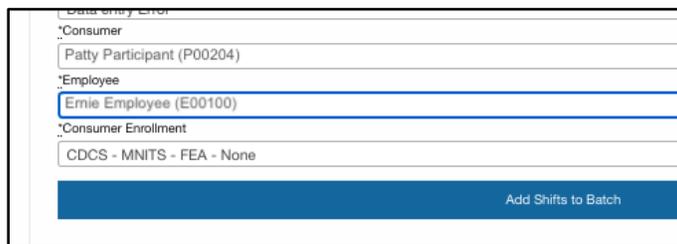
Entering Batch Shift Entry Details (Desktop)



The screenshot shows the mobile version of the 'Batch Shift Entry' form. Under the 'Batch shift entry details:' section, the '*Exception' dropdown is set to 'Other', the '*Reason' dropdown is set to 'Service does not require EVV', and the '*Consumer' dropdown is set to 'Connie Consumer (C12345)'.

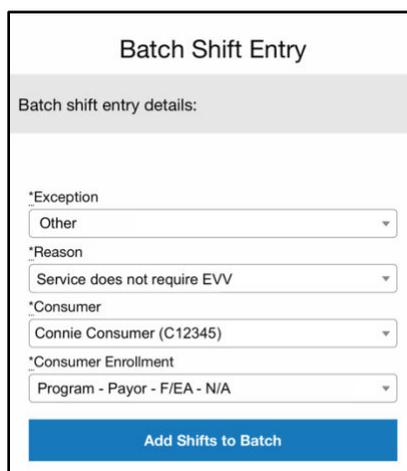
Entering Batch Shift Entry Details (Mobile)

- The Consumer Enrollment field will appear, and the current enrollment will need to be selected.



A screenshot of a desktop web form. It features several dropdown menus. The first dropdown is labeled '*Consumer' and has 'Patty Participant (P00204)' selected. The second dropdown is labeled '*Employee' and has 'Ernie Employee (E00100)' selected. The third dropdown is labeled '*Consumer Enrollment' and has 'CDCS - MNITS - FEA - None' selected. A blue button labeled 'Add Shifts to Batch' is positioned at the bottom right of the form.

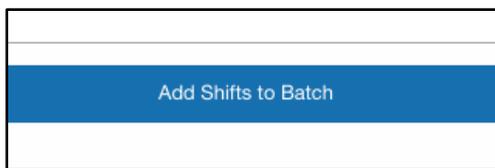
Consumer, Employee, Consumer Enrollment Selection (Desktop)



A screenshot of a mobile web form titled 'Batch Shift Entry'. Below the title is a section 'Batch shift entry details:'. It contains four dropdown menus: '*Exception' with 'Other' selected, '*Reason' with 'Service does not require EVV' selected, '*Consumer' with 'Connie Consumer (C12345)' selected, and '*Consumer Enrollment' with 'Program - Payor - F/EA - N/A' selected. A blue button labeled 'Add Shifts to Batch' is at the bottom.

Consumer and Consumer Enrollment Selection (Mobile)

- Click the **Add Shifts to Batch** button.



A close-up screenshot of a blue button with the text 'Add Shifts to Batch' in white, centered on the button.

Add Shifts to Batch Button (Desktop & Mobile)

- The Shift Details form will appear. All fields marked with a * are required for each shift that you will enter information for.

Create Shifts in Batch Form (Desktop)

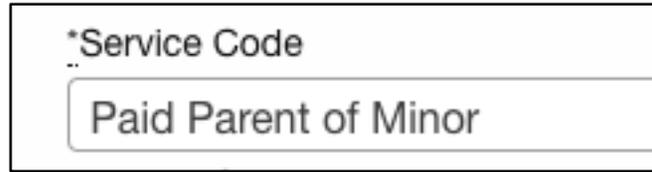
Create Shifts in Batch (Mobile)

- Select the Start Date/Time and Time Zone and Select the End Date/Time and Time Zone.

Start and End Time/Time Zone (Desktop)

Date Time and Time Zone Selection (Mobile)

9. Select the Service Code.



A screenshot of a web form showing a dropdown menu for "Service Code". The selected option is "Paid Parent of Minor".

Service Code (Desktop & Mobile)

10. Select ADL Code(s). (Note: Not all implementations use ADL Codes).



A screenshot of a web form showing a selection area for "ADL Codes". Two options are selected: "Mobility" and "Transferring".

ADL Codes (Desktop & Mobile)

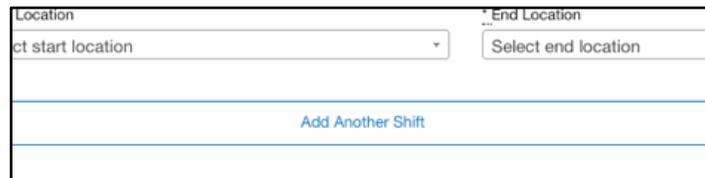
11. Select a **Location**. This may also appear as two fields, one for start location and one for end location.



A screenshot of a web form showing a dropdown menu for "Location". The selected option is "Home".

Location Selection (Desktop & Mobile)

12. Repeat the selections for additional shifts. If you need to add more than seven (7) shifts, you can click the **Add Another Shift** button at the bottom of the list to add additional shifts.



A screenshot of a desktop interface showing two dropdown menus: "Location" (with "Select start location" below it) and "End Location" (with "Select end location" below it). Below these is a blue button labeled "Add Another Shift".

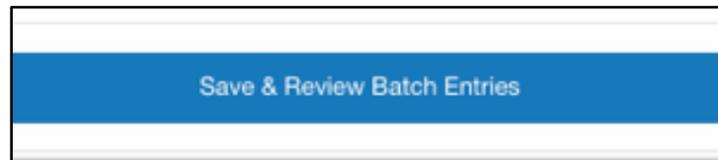
Add Another Shift Button (Desktop)



A screenshot of a mobile interface showing a dropdown menu for "Location" and a blue button labeled "Add Another Shift" below it.

Add Another Shift (Mobile)

13. Click **Save & Review Batch Entries** button at the bottom of the form. This will Save the batch and prepare it for submittal.

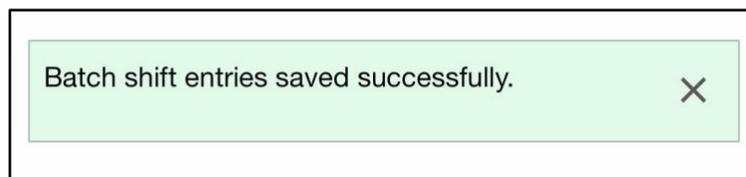


Submit Shift Entries (Desktop & Mobile)

14. A green success message will display on the next page. The batch is now saved and needs to be submitted. If you're ready to submit the shift now, begin with step 4 of the [Submit a Batch](#) instructions. Alternately, prior to submission a shift can be edited, deleted, or added to the batch. See [Editing a Batch](#) for instructions on completing those tasks.



Batch Entry Success (Desktop)

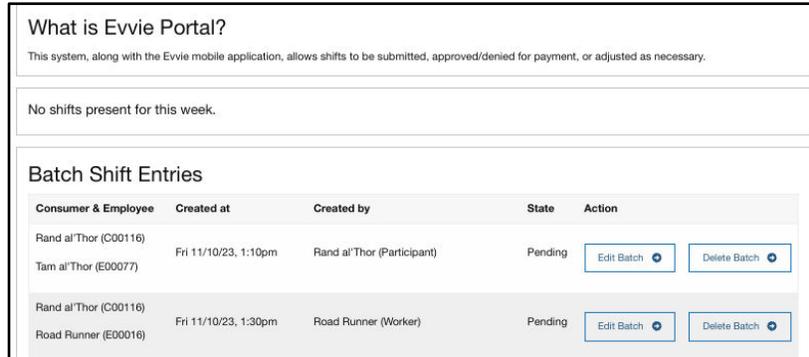


Batch Entry Success (Mobile)

Viewing a Batch

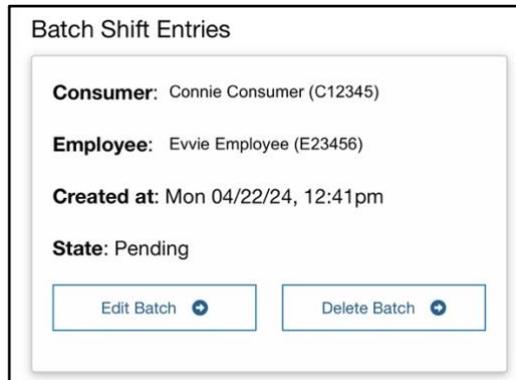
When a batch has been created but not submitted, a user can view the batch, [edit individual shifts in the batch](#), [delete a shift from the batch](#), or [add a shift to the batch](#).

1. **Desktop:** After logging in to evvie portal, scroll to the Batch Shift Entries section of the home screen.



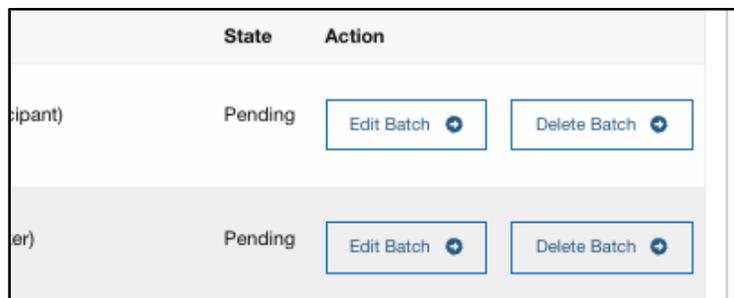
Batch Shift Entries (Desktop)

1. **Mobile:** After logging in to evvie Portal, scroll to the Batch Shift Entries section of the home screen.



Batch Shift Entries (Mobile)

2. **Desktop:** Click the **Edit Batch** button next to the batch you want to edit.



Select a Batch to Edit (Desktop)

Mobile: Click the **Edit Batch** button under to the batch you want to edit.

Batch Shift Entries

Consumer: Connie Consumer (C12345)

Employee: Evvie Employee (E23456)

Created at: Mon 04/22/24, 12:41pm

State: Pending

Edit Batch ➕

Delete Batch ➕

Select a Batch to Edit (Mobile)

- The batch will be displayed. There are edit and delete buttons next to each shift, an **Add another** shift button, and a **Save and Finish Later** button at the bottom of the list.

Batch Items						
Start Date & Time	Starting Time Zone	End Date & Time	Ending Time Zone	Shift Duration	Service Code	Action
Mon 02/26/24, 12:00pm	Eastern Time (US & Canada)	Mon 02/26/24, 9:00pm	Eastern Time (US & Canada)	9 hours, 0 minutes	Respite	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Tue 02/27/24, 7:00am	Eastern Time (US & Canada)	Tue 02/27/24, 5:00pm	Eastern Time (US & Canada)	10 hours, 0 minutes	Respite	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Wed 02/28/24, 12:00pm	Eastern Time (US & Canada)	Wed 02/28/24, 8:00pm	Eastern Time (US & Canada)	8 hours, 0 minutes	Respite	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Add another shift

Save & Finish Later

Edit Batch – Shift Selection (Desktop)

Batch Items				
Start Date & Time	Starting Time Zone	End Date & Time	Ending Time Zone	Shift Dur
Sat 03/02/24, 12:00pm	Eastern Time (US & Canada)	Sat 03/02/24, 8:00pm	Eastern Time (US & Canada)	8 hours, 0 minutes
Wed 03/06/24, 12:00pm	Eastern Time (US & Canada)	Wed 03/06/24, 4:00pm	Eastern Time (US & Canada)	4 hours, 0 minutes
Thu 03/07/24, 8:00am	Eastern Time (US & Canada)	Thu 03/07/24, 6:00pm	Eastern Time (US & Canada)	10 hours, 0 minutes

Add another shift

Save & Finish Later

Edit Batch – Shift Selection (Mobile)

Edit a Shift in the Batch

1. From the shift entry screen, click the **Edit** button next to the shift that needs to be edited. On a mobile browser, you will have to swipe the list of shifts to see the action buttons on the far right of the listing.

Shift Duration	Service Code	Action
5 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	Edit Delete
7 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	Edit Delete

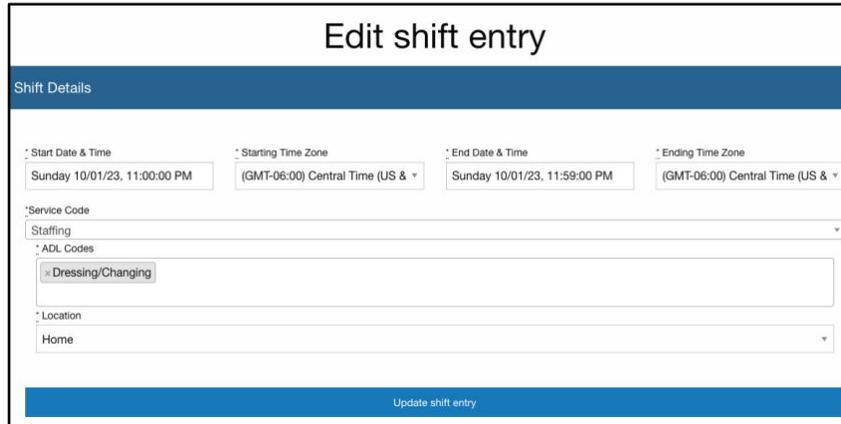
Edit a Shift Button (Desktop)

Batch Items	Shift Duration	Service Code	Action
Item 1	8 hours, 0 minutes	Respite	Edit Delete
Item 2	4 hours, 0 minutes	Respite	Edit Delete
Item 3	10 hours, 0 minutes	Respite	Edit Delete

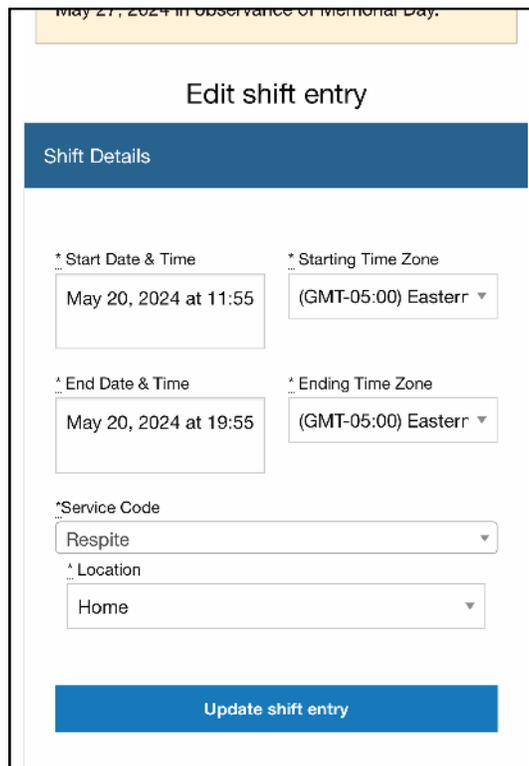
[Add another shift](#)

Edit a Shift Button (Mobile)

2. Change one or more fields on the form, then click the **Update shift entry** Button.



Edit a Shift from the Batch (Desktop)



Edit a Shift from the Batch (Mobile)

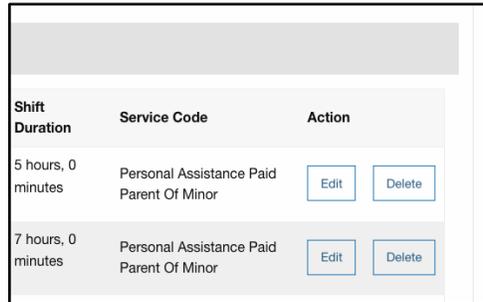
3. A green success message will display on the next page.



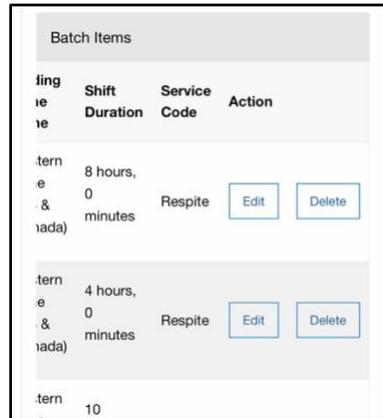
Batch Edit Success (Desktop & Mobile)

Delete a Shift from the Batch

- From the shift entry screen, click the **Delete** button next to the shift that needs to be deleted. On a mobile browser, you will have to swipe the list of shifts to see the action buttons on the far right of the listing.

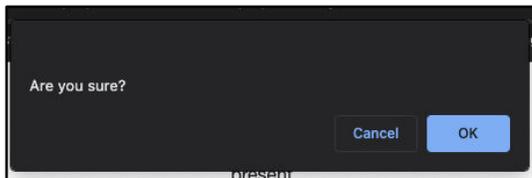


Delete Shift Button (Desktop)

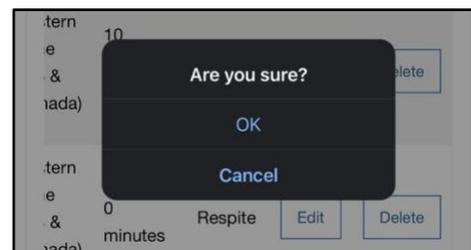


Delete Shift Button (Mobile)

- Click OK on the pop-up.

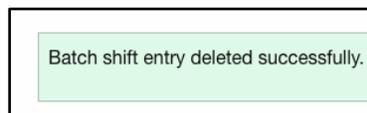


Delete Confirmation Popup (Desktop)



Delete Confirmation Popup (Mobile)

- A green success message will display on the next page.



Delete Success Message (Desktop & Mobile)

Add a Shift to the Batch

- From the view batch screen, click the **Add another shift** button.

Start Date & Time	Starting Time Zone	End Date & Time	Ending Time Zone
Mon 02/26/24, 12:00pm	Eastern Time (US & Canada)	Mon 02/26/24, 9:00pm	Eastern Time (US & Canada)
Tue 02/27/24, 7:00am	Eastern Time (US & Canada)	Tue 02/27/24, 5:00pm	Eastern Time (US & Canada)
Wed 02/28/24, 12:00pm	Eastern Time (US & Canada)	Wed 02/28/24, 8:00pm	Eastern Time (US & Canada)

Add another shift

Add another shift Button (Desktop)

Wed 03/06/24, 12:00pm	Eastern Time (US & Canada)	Wed 03/06/24, 4:00pm	Eastern Time (US & Canada)	4 hr 0 min
Thu 03/07/24, 8:00am	Eastern Time (US & Canada)	Thu 03/07/24, 6:00pm	Eastern Time (US & Canada)	10 hou min

Add another shift

Add another shift Button (Mobile)

- Fill out the fields on the form as required by your program or FMS/FI.
 - Select the Start Date/Time with Time Zone and Select the End Date/Time with Time Zone.
 - Select the Service Code.
 - Select ADL Code(s). (If applicable)
 - Select a Location.
 - Add Notes (if applicable)

Create shift entry in batch

Shift Details

* Start Date & Time: [Text Box] * Starting Time Zone: [Dropdown: Select Timezone]

* End Date & Time: [Text Box] * Ending Time Zone: [Dropdown: Select Timezone]

* Service Code: [Dropdown: Please select a service code...]

* ADL Codes: [Text Area]

* Location: [Dropdown: Home]

Create shift entry

Create Shift in Batch (Desktop)

Create shift entry in batch

Shift Details

* Start Date & Time: Thursday 02/29/24, 12:00pm * Starting Time Zone: (GMT-05:00) Easterr

* End Date & Time: Thursday 02/29/24, 9:00pm * Ending Time Zone: (GMT-05:00) Easterr

* Service Code: Respite

* Location: Home

Create shift entry

Create Shift in Batch (Mobile)

- Click the Create Shift entry button at the bottom of the form.
- A green success message will display on the next page.

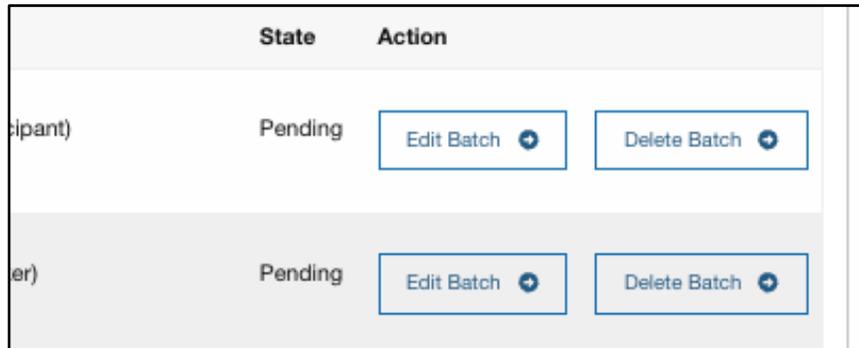


Shift Created Success Message (Desktop & Mobile)

Submit a Batch

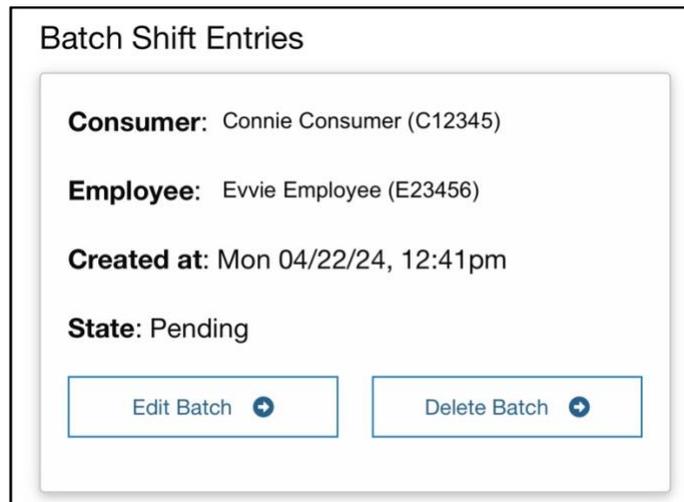
After the batch has been entered, it must be submitted to move to the next step in the process.

1. After logging in to evvie portal, scroll to the Batch Shift Entries section of the home screen. **Desktop:** Click the **Edit Batch** button next to the batch you want to submit.



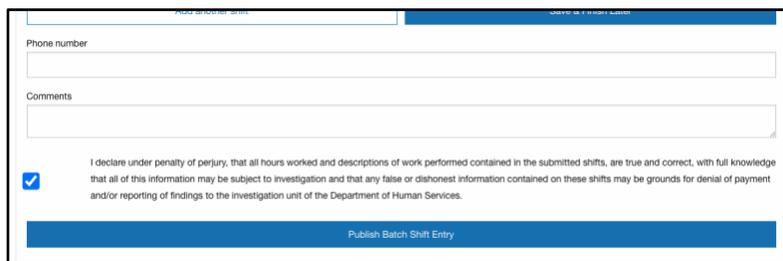
Select a Batch to Submit (Desktop)

Mobile: Click the **Edit Batch** button under to the batch you want to submit.

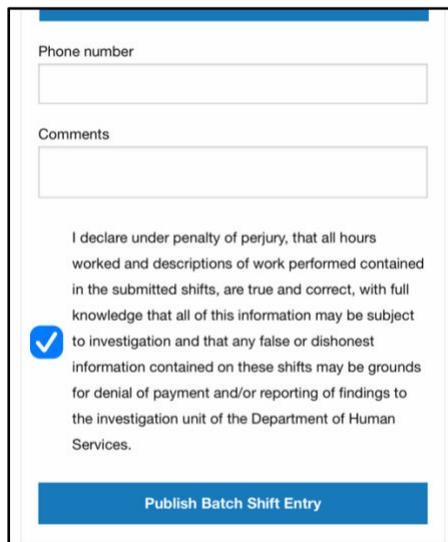


Select a Batch to Submit (Mobile)

2. Scroll to the bottom of the form.
 - a. Optionally add a phone number or comments. Note that some implementations may require you to add a comment to the batch.
 - b. Mark the checkbox to certify the shifts.
 - c. Click the **Publish Batch Shift Entry** Button at the bottom of the form.



Publish Batch Shift Entry (Desktop)



Publish Batch Shift Entry (Mobile)

3. A green success message will display on the next page.



Batch Submitted Success Message (Desktop & Mobile)

The shifts will be viewable in the Shift Index and will begin in a state of Submitted. The shifts will require an approval and an approval lock, following the [Two-Step Approval Process](#) or the [Batch Shift Approval Process](#).