



Batch Shift Entry in evvie Portal (User Guide)

Updated 11.15.23

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Batch Shift Entry in evvie Portal

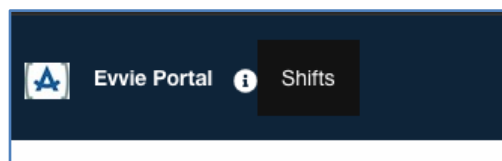
Overview

This guide explains Batch Shift Entry in evvie Portal. 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 Employee could not use the evvie mobile app to record a shift.** Batch entry of manual shifts can also be used when the service provided by the Employee does not require evv.

Creating Batch Shifts

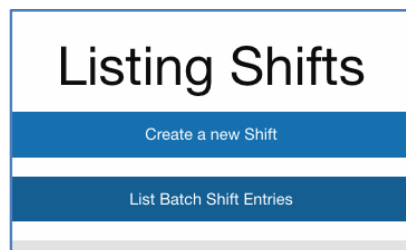
These instructions are for users with an Employee, Participant, or Representative role.

1. After logging in to evvie portal, click on Shifts in the menu bar at the top of the screen.



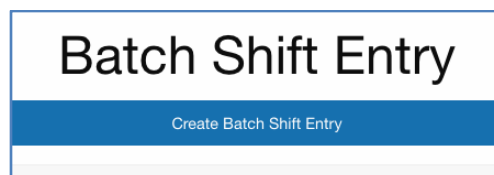
Shift Button in Header

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



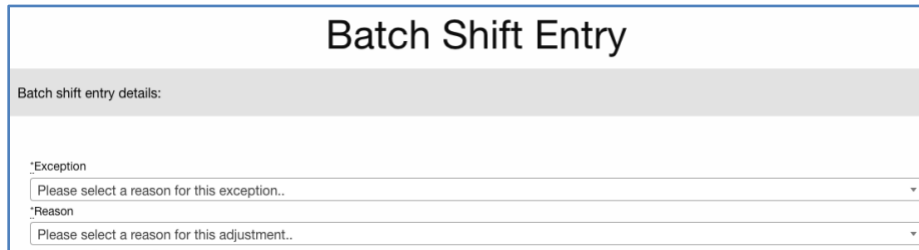
List Batch Shift Entries Button

3. Click the Create Batch Shift Entry button.



Create Batch Shift Entry Button

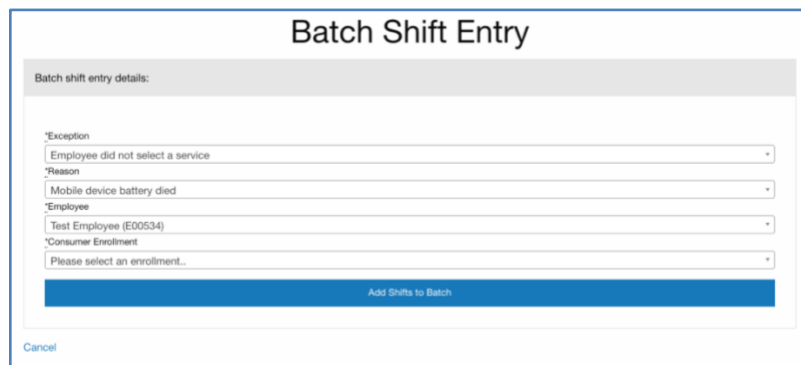
- Select an **Exception**, and a **Reason** for the manual batch entry.



The screenshot shows a form titled "Batch Shift Entry" with a section for "Batch shift entry details:". Below this, there are two dropdown menus. The first is labeled "*Exception" and has the placeholder text "Please select a reason for this exception..". The second is labeled "*Reason" and has the placeholder text "Please select a reason for this adjustment..".

Exception and Reason Selection

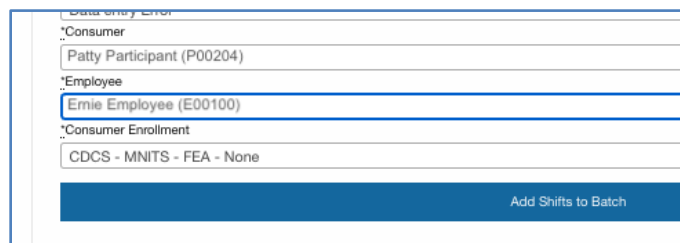
- The next field to select will be either Consumer/Participant or Employee. If you are an Employee, you will need to select the Participant you worked for. If you are a Participant, you will need to select the Employee you are entering shifts for. Representatives will need to select the Consumer from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



The screenshot shows the "Batch Shift Entry" form with several dropdown menus filled with specific values: "*Exception" is "Employee did not select a service", "*Reason" is "Mobile device battery died", "*Employee" is "Test Employee (E00534)", and "*Consumer Enrollment" is "Please select an enrollment..". A blue button labeled "Add Shifts to Batch" is visible at the bottom of the form area. A "Cancel" link is located at the bottom left.

Criteria to Search

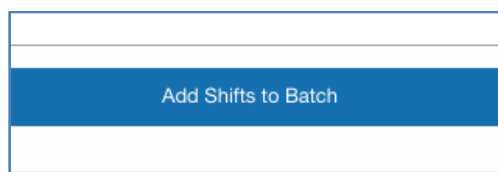
- The Consumer Enrollment field will appear, and the current enrollment will need to be selected.



This screenshot is a close-up of the form fields. The "*Consumer Enrollment" dropdown menu is open, showing a list of options. The option "CDCS - MNITS - FEA - None" is selected and highlighted. Other visible options include "Ernie Employee (E00100)" and "Patty Participant (P00204)". The "Add Shifts to Batch" button is visible at the bottom.

Consumer, Employee, Consumer Enrollment Selection

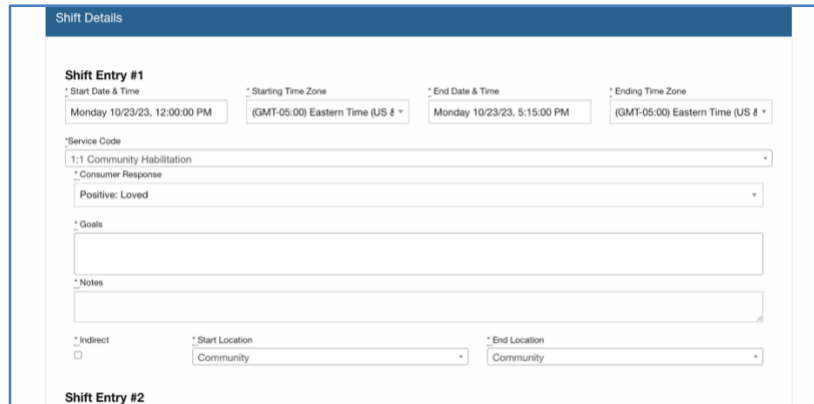
- Click the **Add Shifts to Batch** button.



A close-up screenshot of the "Add Shifts to Batch" button, which is a blue rectangular button with white text.

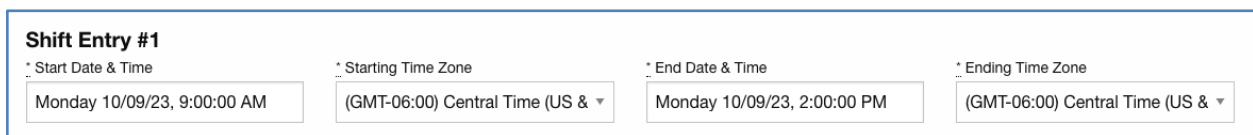
Add Shifts to Batch Button

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



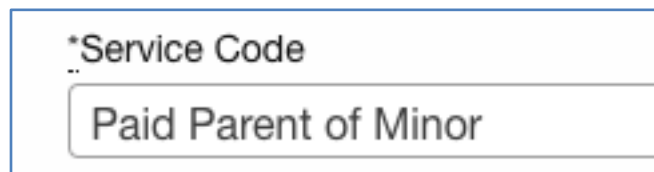
Create Shifts in Batch Form

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



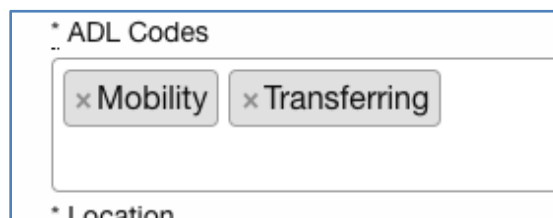
Start and End Time/Time Zone

- Select the Service Code.



Service Code

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



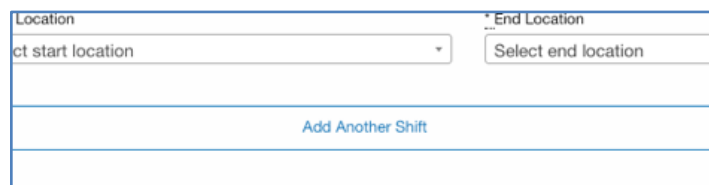
ADL Codes

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



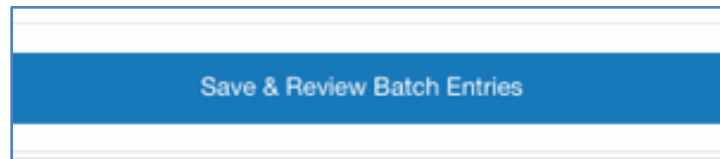
Location

13. 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.



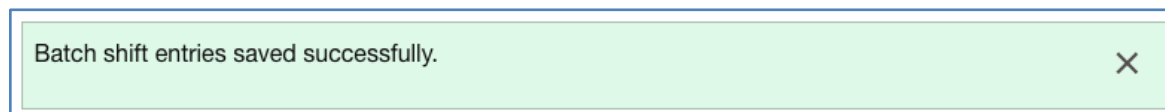
Add Another Shift Button

14. 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

15. 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.

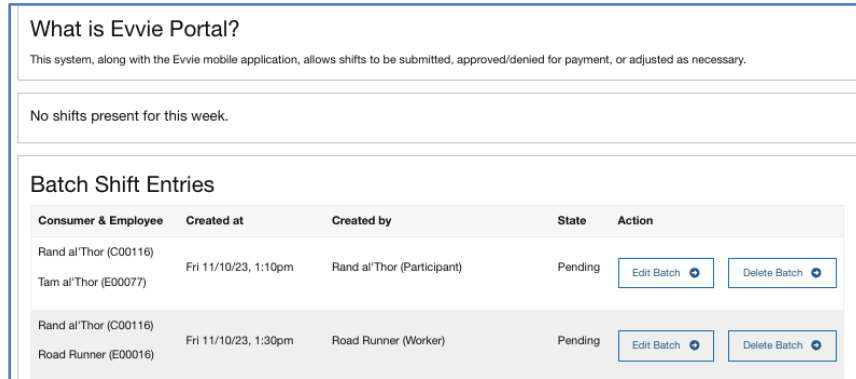


Batch Entry Success

Editing a Batch

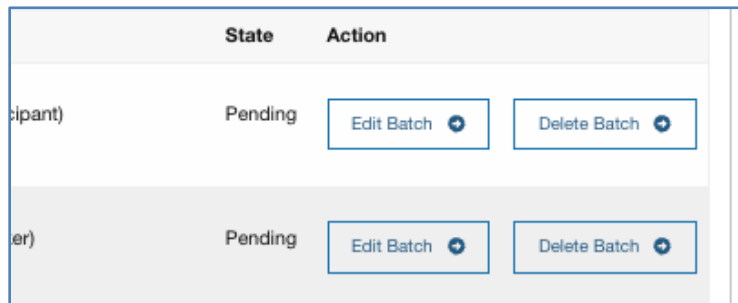
When a batch has been created but not submitted, a user can edit the individual shifts, delete a shift from the batch, or add a shift to the batch.

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



Batch Shift Entries

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



Select a Batch to Edit

- The batch will be displayed. There are edit and delete buttons next to each shift, an **Add another** shift button, and a **Save and Quit** 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
Wed 11/01/23, 12:00pm	Central Time (US & Canada)	Wed 11/01/23, 6:00pm	Central Time (US & Canada)	6 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	Edit Delete
Thu 11/02/23, 6:00am	Central Time (US & Canada)	Thu 11/02/23, 12:00pm	Central Time (US & Canada)	6 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	Edit Delete
Fri 11/03/23, 6:00am	Central Time (US & Canada)	Fri 11/03/23, 12:00pm	Central Time (US & Canada)	6 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	Edit Delete
Sat 11/04/23, 12:00pm	Central Time (US & Canada)	Sat 11/04/23, 7:00pm	Central Time (US & Canada)	7 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	Edit Delete

Add another shift
Save and Quit

Edit Batch – Shift Selection

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.

Shift Duration	Service Code	Action
5 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
7 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Edit a Shift

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

Edit shift entry

Shift Details

* Start Date & Time
Sunday 10/01/23, 11:00:00 PM

* Starting Time Zone
(GMT-06:00) Central Time (US & v

* End Date & Time
Sunday 10/01/23, 11:59:00 PM

* Ending Time Zone
(GMT-06:00) Central Time (US & v

* Service Code
Staffing

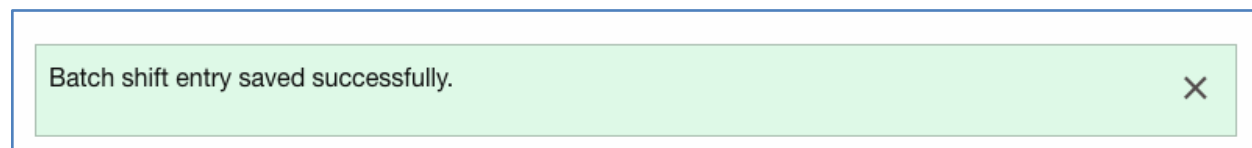
* ADL Codes

* Location
Home

Update shift entry

Edit a Shift from the Batch

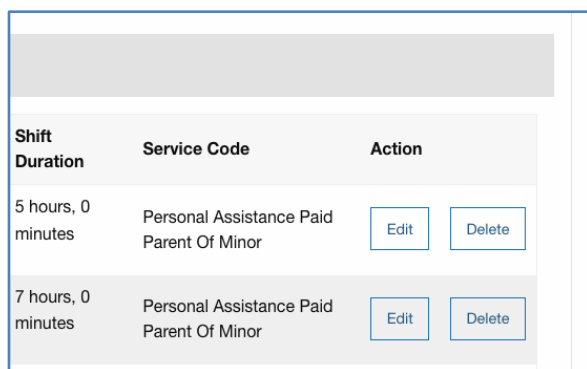
3. A green success message will display on the next page.



Batch Edit Success

Delete a Shift from the Batch

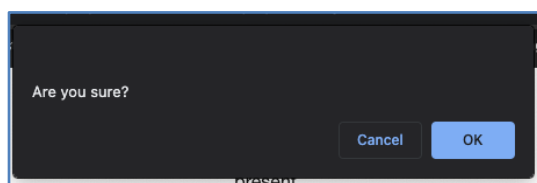
1. From the shift entry screen, click the **Delete** button next to the shift that needs to be deleted.



Shift Duration	Service Code	Action
5 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
7 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

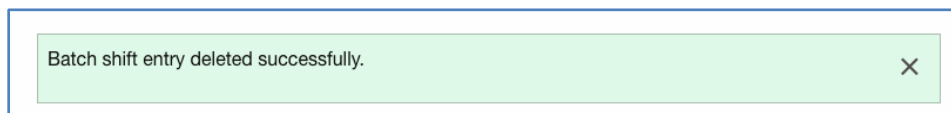
Delete Shift Button

2. Click OK on the pop-up.



Delete Confirmation Popup

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



Batch Shift Delete Success Message

Add a Shift to the Batch

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

Thu 11/02/23, 6:00am	Central Time (US & Canada)	Thu 11/02/ 12:00pm
Fri 11/03/23, 6:00am	Central Time (US & Canada)	Fri 11/03/2 12:00pm
Sat 11/04/23, 12:00pm	Central Time (US & Canada)	Sat 11/04/2 7:00pm

Add another shift

Add another shift Button

- 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)
- Click the Create Shift entry button.

Create shift entry in batch

Shift Details

* Start Date & Time	* Starting Time Zone Select Timezone ▼	* End Date & Time	* Ending Time Zone Select Timezone ▼
*Service Code Please select a service code..			
* ADL Codes			
* Location			

Create shift entry

Create Shift in Batch

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

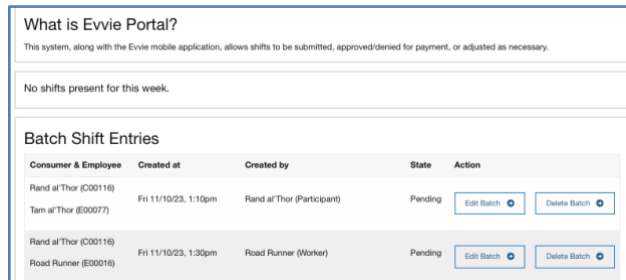
Batch shift entry saved successfully. ✕

Shift Created Success Message

Submit a Batch

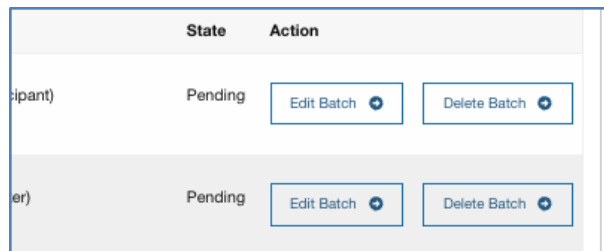
After the batch has been entered, it must be submitted to move to the next step in the process.

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



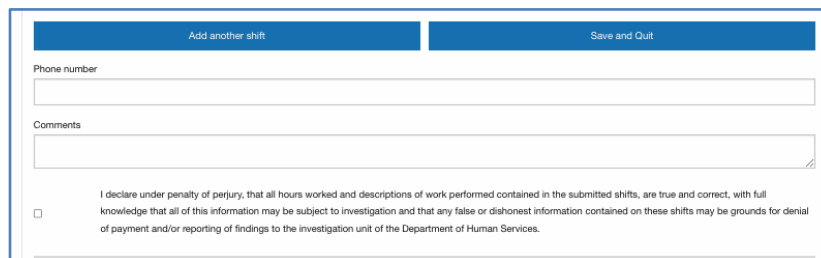
Batch Shift Entries

2. Click the **Edit Batch** button next to the batch you want to submit.



Select a Batch to Edit

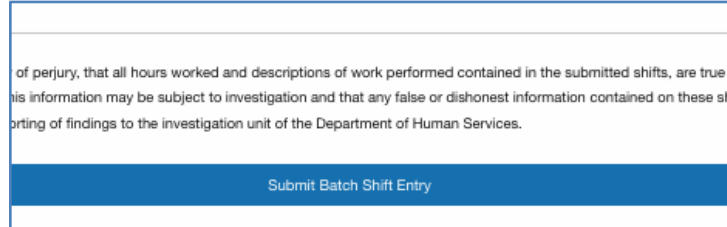
3. Scroll to the bottom of the form.
 - a. Optionally add a phone number or comments. Note that some implementations may require you to add a comment to the batch.
 - b. Mark the checkbox to certify the shifts.



I declare under penalty of perjury, that all hours worked and descriptions of work performed contained in the submitted shifts, are true and correct, with full knowledge that all of this information may be subject to investigation and that any false or dishonest information contained on these shifts may be grounds for denial of payment and/or reporting of findings to the investigation unit of the Department of Human Services.

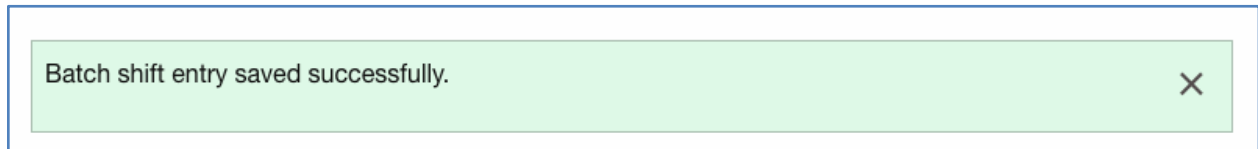
Checkbox to Certify Shifts

- Click the **Submit Batch Shift Entry** button at the bottom of the screen.



Submit Batch Shift Entry Button

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



Batch Submitted Success Message

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, which can be completed by an Admin user, or a combination of the Participant/Employee/Representative associated with the shift. Instructions for approvals are available in the [evvie User Guide](#).