



## Vital EVV™ Platform Software Manual

This Software Manual provides guidance and helpful information regarding the functionality and appropriate usage of the **Vital EVV™ Platform (“VEVV”)**, including answers to frequently asked questions. You may only use VEVV as authorized by your employer, company or organization (“**Organization**”) that hired you to perform healthcare services for your Organization.

### How Do I Log into VEVV for the first time?

**\*Note – You do NOT need to “Activate Your Account”**

1. Click “Sign In”
2. Click “Forgot Password” so that you can reset your password to something you will remember
3. Enter your WORK email address in the “Email” field
4. Click “Submit”
5. Once you click “Submit”, you will be prompted to send a One Time Passcode (OTP) to the email address that you entered. Please hit “Send OTP”
6. Navigate to your email inbox so you can retrieve the OTP
7. Once you have received and remember the OTP (writing down could be helpful so you do not forget it), navigate back to the VEVV application and enter it in the OTP section provided on your screen
8. Once you enter the OTP, you will be prompted to enter your desired password. Enter it in both the “Password” field and the “Confirm Password” field
9. Click “Submit”
10. Once you click “Submit”, you will be directed back to the Sign In page
11. Click “Sign In”
12. Enter your WORK email address in the “Email” field
13. Enter your newly created password in the “Password” field
14. Click “Sign In”
15. You will then receive another pop-up for another “OTP Verification” where you have the option to have the OTP sent to your cellular device or your email address
  - a. If you select your phone number and then complete step 16, it will autofill the OTP if you click into the entry field
  - b. If you select your email address and then complete step 16, you will need to navigate to your email inbox and get the OTP there
16. Click “Send OTP”
17. Click “Validate OTP”
18. You will then be logged into VEVV and ready to start your day!



## Is VEVV usable with shared phones?

While VEVV can be used on shared phones, it is not recommended for security reasons. Before sharing a phone with a co-worker, please check with your Organization regarding any special security rules or procedures that your Organization may have put in place.

## What is the dashboard?

The dashboard permits you to:

1. See your visits for the day
2. Navigate to “View Details” which is where you can start a visit
3. Refresh your visits
4. Navigate to future dates by clicking “Next” to see your upcoming schedule for the next 20 days
  - \*Note – to navigate back to the current date, all you would have to do is click “Previous”
  - \*Note – you will not be able to navigate to past dates
5. See the number of your completed visits so far throughout the current month
6. See the number of visits you have left to complete throughout the current month
7. See the number of miles you have traveled so far throughout the current month

## How do I complete a visit?

**On the dashboard/home page, under the “Upcoming Visits” section, you will see the list of your visits. You will see your patient’s names, disciplines of each visit, and visit times.**

1. Find the name of the patient you are about to go see
2. Click on “View Details” to the right of that patient’s name
3. Once you are ready to start your travels to that patient’s home, you have the option to “Get Directions” to your location should you not know where to go
4. If you do not need to use the “Get Directions” options, you will simply click “Start Travel Time”. Once you click “Start Travel Time”, you will then proceed with your driving to said location
5. Once you pull into the patient’s driveway and put your vehicle in park, then and only then will you click “End Travel Time”
6. Once you click “End Travel Time”, you will have two options:
  - a. Start Visit**
    - Once you have knocked on the patient’s door and have been let into the home by the patient or the patient’s caregiver and have been given verbal permission to start the visit, ONLY THEN will you click “Start Visit”
    - Once you click “Start Visit”, you will then proceed with your visit duties as you normally would. You do not need to do anything more within the Vital EVV application until you are ready to end the visit
    - Once you are ready to end the visit, you will click “Submit”
    - Once you click “Submit”, a pop-up will appear that asks you “Are you sure you want to finish and submit this visit?” You will click “Yes” if you are ready to submit it
    - After clicking “Yes”, a Verify Visit Summary page will appear for you. Here is where the trip and visit



information will appear and where you will need to gather the patient's signature

- On the Verify Visit Summary page, you will scroll down to where there is a signature box and hand the patient your phone
- You will then have the patient sign their name or initials inside the box (if the patient is unable to sign and they have a caretaker there, the caretaker can sign for them)
- Once you gather the signature, you will click "Save"
- After clicking "Save", a pop-up will appear asking you "Are you sure you want to confirm this visit?"
- Click "Yes" if you are ready to actually finish that visit. VEVV will only generate a visit verification if you tap "Yes" to submit the visit information.
- After clicking "Yes", the application will bring you back to your dashboard and that visit will be gone from your Upcoming Visits list, giving you the ability to move onto your next travel of the day to your next visit
- You will then proceed with the same steps for all visits throughout the day

#### **b. Patient Not Home**

- If you get to a patient's home and the patient is not on the premises, you will click "Patient Not Home"
- Once you click "Patient Not Home", a pop-up will appear asking you "Are you sure (patient name) is not at home?"
- Click "Yes"
- After clicking "Yes", the application will bring you back to your dashboard, giving you the ability to start your next travel of the day to your next visit

### **What should I do if I have to cancel a trip after clicking "Start Travel Time"?**

If you have to cancel a trip in process (for example, due to bad weather, a vehicle problem, mistaken click, or other issue) you must contact the appropriate personnel within your Organization for trip cancellation.

### **What should I do if I prematurely clicked "Start Visit"?**

If you mistakenly clicked "Start Visit" before you ensured the patient was home, you must contact the appropriate personnel within your Organization for correction.

### **What should I do if I accidentally start a visit for the wrong person?**

If you mistakenly start a visit for the wrong person, you must contact the appropriate personnel within your Organization for correction, which may involve deleting the visit you inadvertently started and adding a new one to your NDoc schedule. Once they add a new one to your schedule, that will automatically be sent to your Vital EVV dashboard.

**\*Note – if you do not see the newly added visit right away, click "Refresh Visits" or "Next" and then "Previous". This should make the newly added visit appear even if you do not have NDoc live. However, it will NOT appear on your NDoc calendar until you are able to sync again since you do not have access to NDoc live. So, in order to document**



that newly added visit while completing the visit, you will need to find a place with internet access so that you can document during the visit, should that be what you desire. If you have a personal hotspot on your IOS device (which you should), you should connect to that so you can perform a sync in NDoc.

**Disclaimer:** This Software Manual is intended to serve as a technical guide when using VEVV, but by no means is this an exhaustive list of allowed or prohibited activities, and it *should not be relied upon as a complete list of policy or regulatory compliance topics*. It is the responsibility of your Organization to seek its own counsel and develop its own policies, workforce training, communication topics and methods to maintain compliance with State and Federal laws and regulations, including requirements, mandates, rules and guidelines promulgated or published by the State of New York in relation to implementing requirements of the Cures Act with respect to electronic visit verification (EVV).