

# Electronic Visit Verification (EVV)

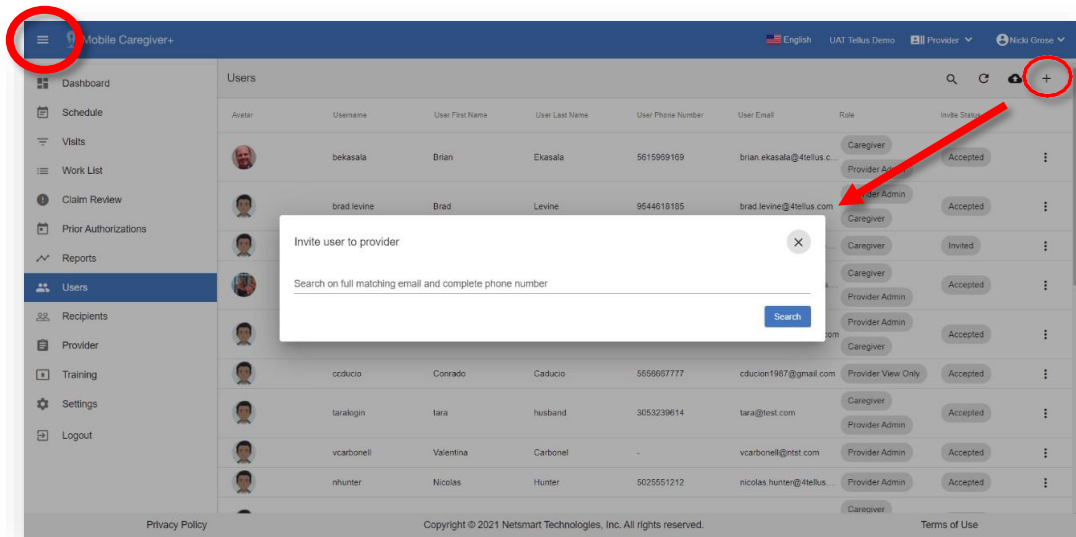
## How to Manually Add Users into Netsmart's Mobile Caregiver+ EVV

Ready to add your organization's personnel to the Netsmart's Mobile Caregiver+ EVV system? Use this guide to learn the basics.

Note: If your organization has a significant number of personnel providing EVV-required services to Medicaid Members, please review ["How to Import Users into Netsmart EVV"](#) which may be a quicker and easier method for you to use.

### Step 1

- In Netsmart Mobile Caregiver+ EVV, click the menu icon (three lines in the top left corner) to expand the **Main Menu**.
- Select **Users** in the menu tab to view the **Users** page.
- Select the "Add User" icon (plus sign (+) in the upper right corner of the screen) to open the "Invite user to Provider" dialog box.



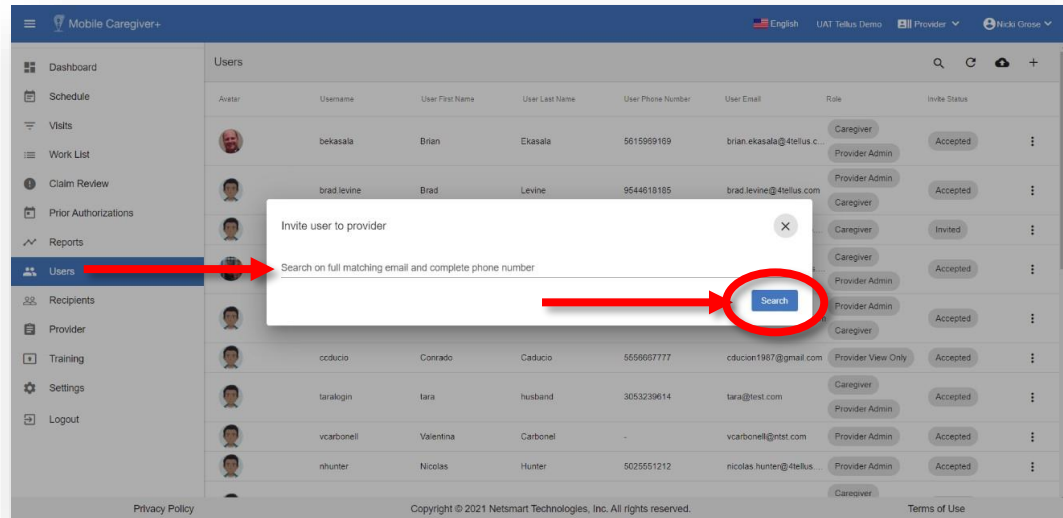
## Step 2

- Enter a User email address or phone number.
- Select **Search**.

If the User already exists in the system, the list of Users who match the email address or phone number you entered will appear on the screen. Follow the instructions in Step 3A.

Do not create a duplicate account for the User if it already exists in the system.

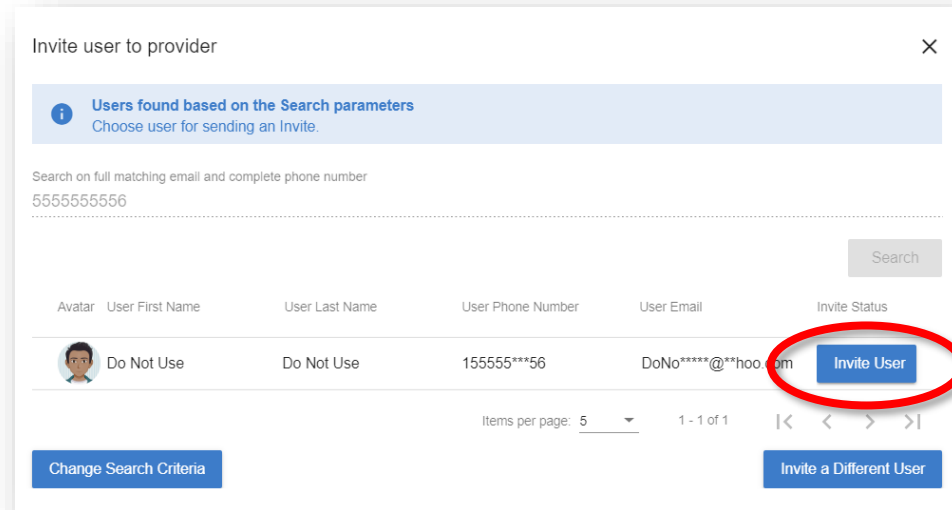
If the User does not already exist in the system, follow the instructions in Step 3B.



### Step 3A

- If the User account already exists in the system, select **Invite User** next to the applicable username and contact information.
- An email will be sent to the User to join your agency. The User will have 36 hours to accept the invitation before it expires.

It is recommended you notify the User of the incoming invitation, so that they download the mobile application (if using the EVV mobile app), log in and complete the registration process within 36 hours and do not disregard the invitation as a phishing attempt or spam.




Invite user to provider

Users found based on the Search parameters  
Choose user for sending an Invite.

Search on full matching email and complete phone number  
5555555556

Search

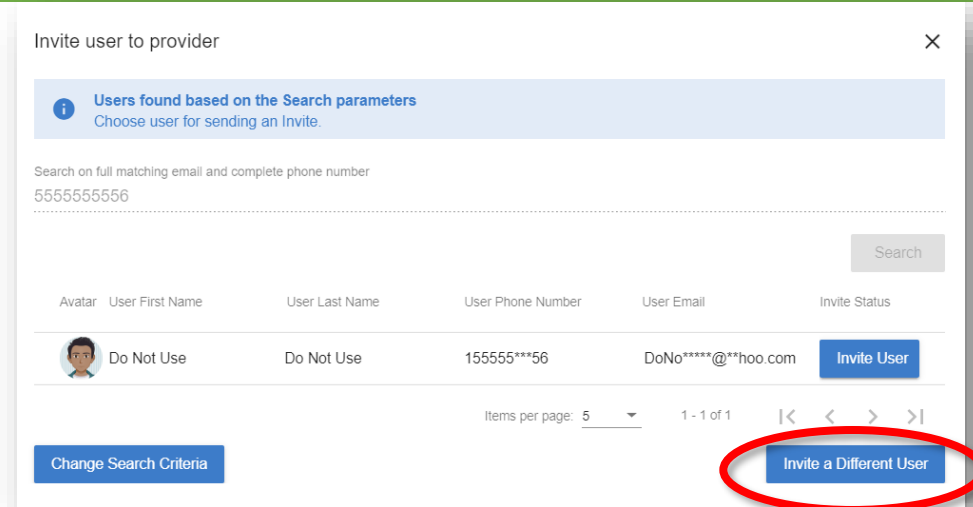
Avatar	User First Name	User Last Name	User Phone Number	User Email	Invite Status
	Do Not Use	Do Not Use	155555***56	DoNo*****@**hoo.com	<b>Invite User</b>

Items per page: 5 1 - 1 of 1

Change Search Criteria Invite a Different User

### Step 3B

- If the User account does not exist in the system, select **“Invite a Different User”** to open the “Invite User to Provider” page where you can enter User details.




Invite user to provider

Users found based on the Search parameters  
Choose user for sending an Invite.

Search on full matching email and complete phone number  
5555555556

Search

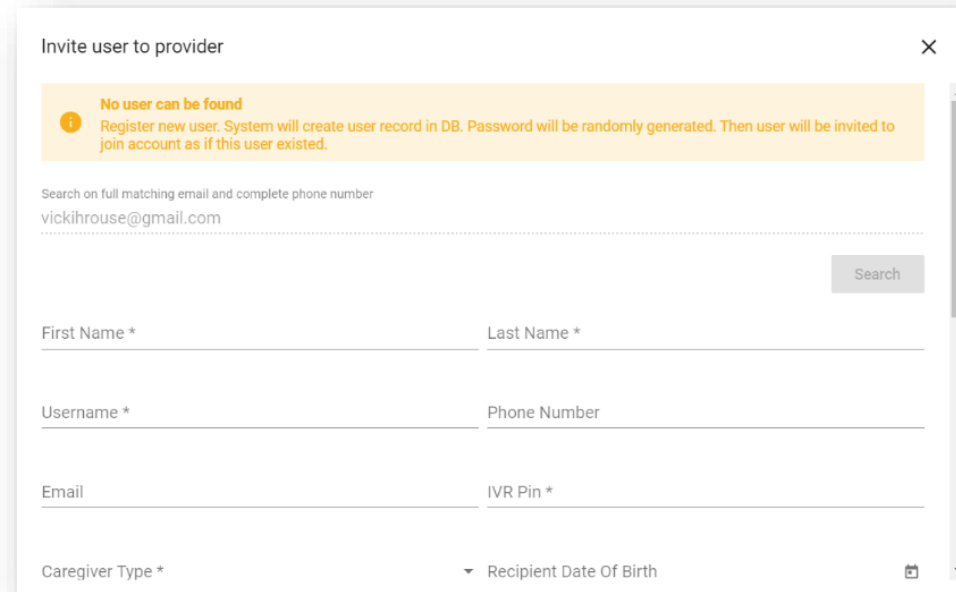
Avatar	User First Name	User Last Name	User Phone Number	User Email	Invite Status
	Do Not Use	Do Not Use	155555***56	DoNo*****@**hoo.com	<b>Invite User</b>

Items per page: 5 1 - 1 of 1

Change Search Criteria **Invite a Different User**

**Provide the following information to invite the New User:**

- **First name**
- **Last name**
- **Username:** This is the New User's preferred Username that will be used to log into Netsmart Caregiver+ EVV.
- **Mobile Phone Number:** A mobile phone number is required if you do not enter an **Email** address.
  - This can also be used for notification and password reset purposes.
  - Only numeric characters can be entered; i.e., 0-9. It is not necessary to add parentheses or hyphens.
- **Email:** A valid email address is required if you do not enter a **Phone Number**.
  - This can be used for notification and password reset purposes.
- **Caregiver Type:** If you are setting up a Caregiver, select the type of Caregiver they are. Use the dropdown list to see available types. You can select only one type.
- **Rendering Provider ID:** If you are setting up a Caregiver, enter the 9-digit Medicaid ID for the Caregiver.



Invite user to provider

No user can be found  
Register new user. System will create user record in DB. Password will be randomly generated. Then user will be invited to join account as if this user existed.

Search on full matching email and complete phone number  
vickihrouse@gmail.com

Search

First Name \* Last Name \*

Username \* Phone Number

Email IVR Pin \*

Caregiver Type \* Recipient Date Of Birth



If you do not enter a Rendering Provider ID here, you will be required to enter it each time you schedule a visit for this Caregiver.

- **Roles:** Use the dropdown list to view available roles and select one or more of the following:
  - **Admin** — This role allows the User to view and edit information in the Administrator Portal. There is no need to select any other role; Administrators have access to everything in the system.
  - **Billing** — This role allows the User to access Claims functions only: Visits, Work List, Claim Review, and Prior Authorizations. This role can be combined with any other role; except Monitor.
  - **Caregiver** — This role allows the User to view only the information and schedules for the Recipients (Members) for whom they provide care. **If a User is assigned the Caregiver role *only*, that User will only have access to this information via the EVV+ mobile app. They will not have access to the information via the Administrator Portal.**



- **Monitor** — This role allows the User to only view information. Users assigned to the Monitor role cannot make any changes using the Administrator Portal. This role can be combined with the Caregiver role only.

Complete other fields if the information is known. You can always come back and Edit User Details.

- **Click “Invite New User” to add the New User.**

The User information will be saved, and you will return to the **Users** page.

An email will be sent to the User to join the Netsmart Caregiver+ EVV system. The User will have 36 hours to download the mobile application (if using the EVV mobile app), log in, and complete registration before the invitation expires.

It is recommended you notify the user of the incoming invitation. They must download the mobile application (if using the EVV+ mobile app), log in, and complete the registration process within 36 hours. Please inform them to



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not disregard the invitation as a phishing attempt or spam.

If you do not want to add the User at this time, select **Cancel** to return to the **Users** page. The New User information will not be saved.