OVERVIEW
The E-System Visit Verification app is a smartphone app to be used by SSP’s only to track punch in/out when delivering service. It is not be used by a Managing Employer, unless that ME is acting as an SSP for another client.

Smartphone Installation (search either Android or Apple stores for “ESystem Visit”):

LOGIN
To Login, enter your email address provided by your agency, followed by your password. Initial passwords will be provided by the agency and/or created by each SSP.

MAIN PAGE
From the main page, simply click on the Client that you are ready to start your visit with.
To begin your visit, select the Service you are providing to the Client, and then click Punch In. It will ask you if you are ready to begin your visit, to which you answer Yes.

REMINDER— the first time you use the app to punch in, it will ask if you want to allow the application to access the device’s GPS – you MUST answer yes to this prompt.

To end the visit, simply click on the Punch Out button. You may enter optional notes – please know these do not replace your Service Notes. This note section is to relay a message to the Managing in regards to the punch. Once you punch out, you will return to the main screen.
SERVICE NOTES:

You can add the goals and service description to punches after you have completed the punch out process. To do that, simply click on the “Service Notes” button from the main screen. This will list all the punches that need documented. To begin, click on the “Notes” button next to any punch.

GOALS/OUTCOMES

To start your note, enter your goals/outcomes in the field shown above. You can also click the “Copy from Previous Punch”, which will take the goals/outcomes from the previous punch and copy them into the field. Click “Next” once you have the goals entered.

SERVICE DESCRIPTION

To complete the note, enter your description of service in the field above. Click the “Save” button, and this will complete the documentation for that punch. The punch will not be in the Service Notes portal anymore once completed.

*Pro Tip: If doing the Service Notes from your phone, use the “Talk to Text” function. If you press the microphone key and start talking when prompted your phone will calibrate the words and type them for you.
**ADDITIONAL INFORMATION:**

- This app supports an offline mode. You will be able to log in, punch in and punch out if you are in a location without cellular service.
- Once you are in a “punch in” state, you will only be able to Punch Out, or cancel the visit that is open.
- If you provide multiple authorized services on a client, you must punch out under the first service, and then back in under the next one.
- If location is not showing up, make sure your GPS is turned on OR data is on.

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**E-System Visit Verification**

*Website Instructions for SSP’s*

**OVERVIEW**

A SSP can use the E-System website to view their punches and view/enter their Encounter Notes for each punch. At the end of each day, or on a regular basis, a SSP should access the E-System website.

Please note that while a SSP can enter the punch notes directly from the smartphone app, they can also view and/or enter their notes using this website.

To access the E-System website, use your web browser and go to [http://www.esystem.us](http://www.esystem.us) - Click the LOGIN link on the upper right-side of the page. From the login page, enter your email address and password to gain access to the site.

![Table](table.png)

You can click the blue INFO button to see the details of each punch. You will also need to enter your Service Notes for each punch here. Click the second button, the NOTE button, to enter your information.

**NOTE** – this will replace your paper Service Notes forms that you use today.

**QUESTIONS:**

For any questions or issues using the E-System Visit Verification app, please contact your agency representative or the internal IT Department (A-Tech).
E-System Visit Verification

Website Instructions for Managing Employer

Overview
A Managing Employer will use the E-System website to accomplish a few different things:

- To approve EVERY punch entered by their SSP’s
- To manually enter a missed punch from an SSP
- To adjust an existing Punch from an SSP, including changing the time in or out, and location
- To complete a monthly Managing Employer Progress Note

To access the E-System website, use your web browser and go to http://www.esystem.us - Click the LOGIN link on the upper right-side of the page. From the login page, enter your email address and password given by AWC staff to gain access to the site.

Punch Approvals
To approve a punch, go to the “Approvals” page, and you will see a list of pending punches that require your approval. Click the gold “Approve Punch” button. This will open the approval dialog, where you will see the Service Notes entered by the SSP. You cannot approve a punch without these notes previously entered in by the SSP. After you scan each punch to ensure the time, location, service code and service note content is verified by you. You will approve a punch by adding your signature to the note & hitting the blue “save” button at the bottom of the screen.
Manually enter a punch:
If you need to manually enter a punch that an SSP has missed. For example the SSP completely forgot to clock in and out all together; click the “Add Punch” button above the punch grid. A completely blank punch detail screen will appear for you to manually enter in all the correct information needed.

To edit and change an existing punch:
If you need to edit/change an existing punch, for example: If the SSP forgot to clock out so their punch out time is not correct. Click the “Edit Punch” blue button to the left of the gold “Approve Punch” button on the specific punch that needs adjusting. A screen will pop up with the punch details, from that screen you will make any corrections needed. When editing a punch you must always leave a “Change or Reason Note” to document why the edit was made. For the example above, the note would be “SSP forgot to punch out, corrected time from 3:00p to 5:00p”. E-System will not let you save this edit without a reason note submitted. Once all is corrected & the reason note is added simply press the blue “save” button at the bottom of the screen.

Monthly Progress Notes
You will also see a menu item for Progress Notes. In the pull down menu to the left of the computer screen is where you will see the button “Progress Notes”. This is where you will enter a progress notes for a Client for each month. Once you click “Progress Notes” a new page will open up, then you click the blue button “Add Progress Note”. Then choose the client, month and year of the note. A screen will populate, this information is the exact information that was used on paper just now online. This note it to document the progress made over the month working towards the goals set by the ISP. There is a blue “Copy Related Outcome Statements from Previous Month”, typically these don’t change month to month as these are set in the ISP yearly. After you have entered one note, you can simply click the copy from previous month button to have E-System copy and paste your previous related outcome statements from your previous note entry. If you do not wish to use that button and type freely that option is always available! As always these only need submitted once a month.

*Pro Tip: if doing this from your phone, use the “Talk to Text” function. If you press the microphone key and start talking when prompted your phone will calibrate the words and type them for you. It could save some time and hand muscle cramps! ☺