



Wisconsin Electronic Visit Verification Supplemental Guide

Introduction

Department of Health Services Electronic Visit Verification System

This guide details the Wisconsin-specific functions of the Wisconsin Department of Health Services (DHS) electronic visit verification (EVV) solution from Sandata.

DHS has chosen an EVV solution, offered through a vendor called Sandata, which may be used by all DHS programs, provider agencies, and program payers. DHS provides the Sandata EVV system's data collection functionality free of charge to providers and program payers. Provider agencies and program payers do not have to purchase an EVV system if they use the DHS-provided system.

The DHS EVV system is compliant with Section 12006 of the 21st Century Cures Act, as well as all state and federal privacy and security laws and requirements, including the Health Insurance Portability and Accountability Act of 1996 (HIPAA). It also complies with the Americans with Disabilities Act (ADA). The DHS-provided system is able to support multiple programs and services with different policies, procedures, and business rules.

Sandata coordinates with DHS to ensure that Sandata has all the data necessary for EVV transactions. The data consists of information about members/participants, prior authorizations and service authorizations, provider agencies, and workers. All aspects of the system are role-based to secure the data and protect the privacy of members, participants, and workers. DHS and Sandata securely transfer data every calendar day.

DHS also uses Sandata technology that allows for integration of data from an alternate or third-party EVV system (that is, a system not provided by DHS). Sandata calls this technology an aggregator. It allows provider agencies and program payers to choose to use an alternate EVV system. Refer to the DHS Alternate EVV webpage at <https://www.dhs.wisconsin.gov/evv/alternateevv.htm> for more information.

Who is this resource for?

This resource is for administrative staff who will need to use the Sandata EVV Portal. Provider agencies and fiscal employer agencies (FEAs) choosing to use the DHS EVV solution should also use the DHS-provided training resources found at <https://www.dhs.wisconsin.gov/evv/training.htm>.

What will I need?

Two documents are needed during the EVV provider agency administrator training:

- This Wisconsin EVV Supplemental Guide is the primary document to provide insight into how Wisconsin provider agencies should use the Wisconsin-specific EVV system.
- Sandata's online guide provides instructions on how to navigate the Sandata EVV system more generally. This is found on the Sandata EVV Portal. Additional information is provided in the Sandata guide that is not applicable to the Wisconsin-specific EVV system.

As a reminder, training resources do not supersede DHS policy. Refer to the [DHS EVV resources webpage](#) for EVV policy information.

What if I have questions?

DHS is a partner in this process and is working to ensure a smooth EVV implementation.

Access additional resources and training materials by:

- Visiting the DHS EVV webpage at <https://www.dhs.wisconsin.gov/evv/index.htm> and using the sidebar link to the Training section.
- Calling Wisconsin EVV Customer Care at 833-931-2035.
- Emailing vdx.contactevv@wisconsin.gov.



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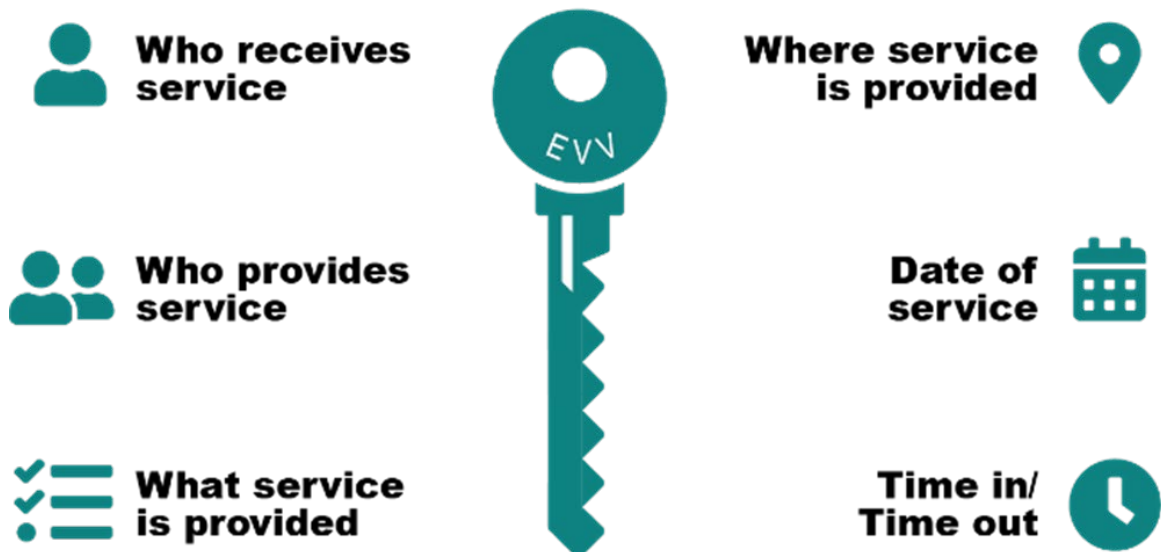
1. Program Overview

Why use EVV?

The federal 21st Century Cures Act requires all states to implement EVV for Medicaid-covered personal care services (by January 2021) and home health services (by January 2023). States that do not use EVV will be penalized.

DHS has determined that service codes T1019, T1020, S5125, and S5126 are included in this federal mandate for 2021. (Refer to [Appendix B](#) of this guide for descriptions of these service codes). Visits billed using these service codes require electronic verification of six data points.

6 KEY DATA POINTS



DHS will be implementing EVV in two phases: a soft launch and hard launch.

Soft Launch: November 2, 2020

- Workers are required to use EVV.
- To accommodate the learning curve, DHS will not deny claims or disregard encounters due to missing EVV data.
- Workers, provider agencies, and DHS will cooperatively overcome any initial hurdles during the implementation, establish processes, and troubleshoot any problems or barriers that come up.

Hard Launch: TBD

- DHS will deny fee-for-service claims without matching EVV visit information.
- HMOs and managed care organizations (MCOs) may deny claims without matching EVV visit information.
- DHS may exclude HMO and MCO encounters without matching EVV visit information from future capitation rate setting development.
- IRIS (Include, Respect, I Self-Direct) FEAs will deny provider agency claims without matching EVV visit information.
- IRIS participants with participant-hired workers should refer to IRIS EVV Policy at <https://www.dhs.wisconsin.gov/publications/p03053.pdf>.

2. System Overview

Introduction

The DHS EVV solution only collects EVV data.

Sandata EVV Portal users may notice items that are not supported by the DHS EVV solution. These modules **will not function** in the DHS EVV solution:

- Scheduling
- Billing
- Payroll

Accessibility and Language

DHS is committed to clear communication with all those impacted by EVV in Wisconsin:

- Written training materials on the [DHS training webpage](#) are provided in English, Hmong, and Spanish. Other languages are available upon request. Send requests by email to dhsevv@wisconsin.gov listing the specific written material(s) and language(s) requested. Please allow 30 business days for the preparation and delivery of appropriate translations.
- The DHS EVV solution provided by Sandata includes 15 languages for both the mobile app and telephonic systems. Language choice can be set individually. Refer to [Appendix C](#) of this guide for the language list.

Note: Sandata uses different terms than DHS service delivery usually uses. The following table provides a guide to terms used by DHS versus Sandata. Throughout the rest of this document, Sandata's terms will be used to match their screen directions.



DHS Service Delivery	Sandata
worker	employee
member	client
participant	
service authorization or prior authorization	authorization

This guide will also reference the [ForwardHealth Portal](#), a DHS resource website with information specific to Wisconsin Medicaid for provider agencies, clients, and payers. Anyone may view content on this website; however, in order to perform certain activities, such as requesting a Medicaid ID or entering and editing provider agency, employee, or client information, the user must click Login at the top of the webpage to enter the secure side of the ForwardHealth Portal.

Provider Agency Identification

In order for EVV visit information to be correctly matched to Wisconsin claims and encounters, all provider agencies and employees will need a way to confirm who is providing services, as mandated by the 21st Century Cures Act. DHS is using provider agencies' Medicaid IDs for this purpose. Provider agencies that are not required to be Medicaid enrolled as part of their normal delivery of services to clients, such as supportive home care agencies, will need to request a provider agency ID following the steps outlined in the [Non-Medicaid Enrolled Providers](#) section of this guide. For these provider agencies, DHS uses the provider agency ID to identify the agency and begin the set-up process for the Sandata EVV system or aggregator. This provider agency ID, used to identify the non-Medicaid enrolled agency in the EVV system, is assigned through the ForwardHealth Portal.

Medicaid-Enrolled Providers

A provider agency's Medicaid ID will also serve as their unique provider agency ID for EVV. Medicaid-enrolled provider agencies will continue to be required to maintain up-to-date provider agency information through the secure ForwardHealth Portal.

Non-Medicaid Enrolled Providers

Provider agencies that are not enrolled in Wisconsin Medicaid as part of their normal delivery of services, including many supportive home care agencies, will use the secure ForwardHealth Portal to obtain a provider agency ID that will be considered their Medicaid

ID. Provider agencies can learn how to obtain a unique provider agency ID from the secure ForwardHealth Portal:

- In the Electronic Visit Verification Portal Functionality User Guide at <https://www.dhs.wisconsin.gov/publications/p02713.pdf>.
- In the How Non-Medicaid Providers Apply for an Electronic Visit Verification Unique Provider Agency Identifier training video at <https://www.forwardhealth.wi.gov/WiPortal/StaticContent/provider/training/evv/training1/index.html>.

Once ready, provider agencies can start the process of obtaining a unique provider agency ID at <https://www.forwardhealth.wi.gov/WiPortal/Subsystem/EVV/EVVProviderEnumerationApplication.aspx>.

EVV System Set-up

DHS will send provider agency information from the ForwardHealth Portal to Sandata. Sandata will then set up provider accounts in the Sandata system. For EVV, a Medicaid ID and a provider agency ID are the same number. This ID number is used in several ways:

- Training registration in the Sandata Learning Management System requires this number in the Medicaid ID number field.
- This ID number is also used when communicating with ForwardHealth or Sandata.
- Provider agencies will need this ID number when calling Wisconsin EVV Customer Care.

The secure ForwardHealth Portal is also used to update provider agency:

- Business contact information.
- Tax ID information.
- Employee information. (Refer to the [Employee Module](#) section of this guide for more details.)

Sandata Agency ID Number

All provider agencies using the DHS-provided system will be assigned a new provider agency ID from Sandata. A few days after the first administrator from the provider agency completes their training, Sandata (through eTrac) will send a welcome email with important information, including the Sandata provider agency ID. Sandata will send this welcome email to the provider agency email address listed in the secure ForwardHealth Portal in the “Mailing Address” panel.

Provider agency administrators will use the Sandata provider agency ID (preceded by “STX”) when logging in to the Sandata EVV Portal. Employees will also need the Sandata provider agency ID as part of their login credentials when using mobile visit verification (MVV) to check in and out for their visits.

Information Exchange

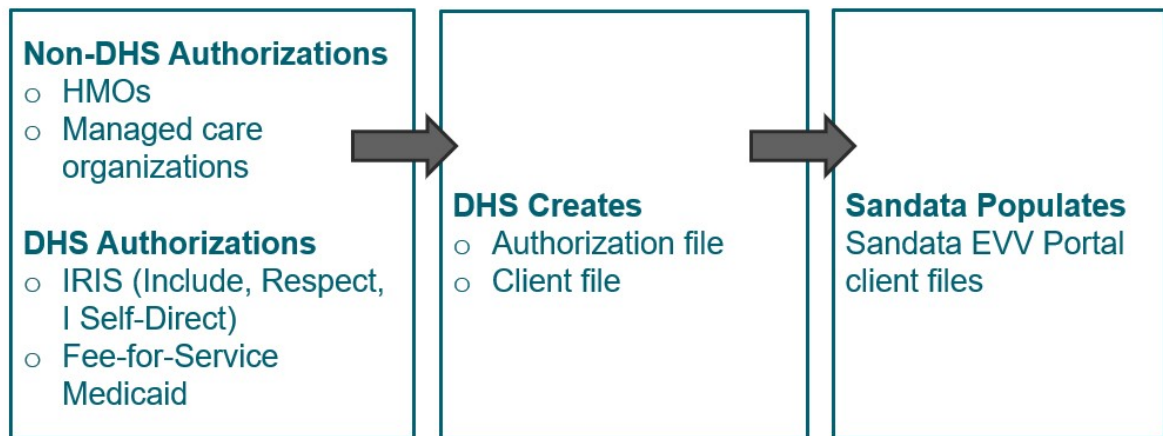
A provider agency will access two portals for EVV: the secure ForwardHealth Portal and the Sandata EVV Portal. A best practice for provider agencies is to have at least two users with security administrator access to each portal. This provides good backup for vacations and other circumstances.

Information from ForwardHealth, Sandata, HMOs, MCOs, and Wisconsin IRIS Self-Directed Information Technology System (WISITS) will be shared nightly for appropriate updates. The users of the secure ForwardHealth Portal and the Sandata EVV Portal will be able to see these updates the next calendar day.

Updating Information

Information that originates with Sandata's system includes:

- Administrative users whose roles are assigned in Sandata's EVV Portal. (These files are not shared with ForwardHealth.)
- Visit information.



Information imported into the Sandata EVV Portal includes:

- Client files:
 - Information in approved or amended authorization files from HMOs, MCOs, or WISITS transfers to the provider agency's client files in the Sandata system.
 - Changes to an authorization, such as end date or changes to services, need to be made through the usual authorization process, not the Sandata system.
- Employee files:
 - A best practice is to update employee information on the secure ForwardHealth Portal as part of new hire or termination processes. Employees who need access to the Sandata system to check in and out will need to be identified through the secure ForwardHealth Portal. (Refer to the [Employee Module](#) section of this guide.)

- Some information, such as email address and end dates, needs to be updated on the secure ForwardHealth Portal. Demographic information changes, such as changes to name, Social Security number, and date of birth, will need to go through EVV Customer Care. Provider agency information:

Updates to a provider agency's address and ForwardHealth administrator information can be made on the secure ForwardHealth Portal. The information updated on the secure ForwardHealth Portal is only shared with Sandata and appropriate HMOs, MCOs, and FEAs.

Billing Information

The DHS-provided EVV system is not a billing or claims system:

- ForwardHealth fee-for-service provider agencies should refer to the ForwardHealth Online Handbook for the most current billing information.
- Provider agencies billing through HMOs, MCOs, or FEAs should refer to their contract for billing information.

Program payer administrative staff may see changes to their billing procedures.

Note: Authorization is not a guarantee of payment. EVV is not a guarantee of payment.

3. Security (User Set-up)

This section contains the program requirements for logins, passwords, and assigning Sandata EVV Portal users in the Sandata system. Please note that "user" refers only to administrative staff, not employees who perform visits.

Refer to [Appendix D](#) of this guide for guidelines on setting up a password for the Sandata EVV Portal.

Security Roles and Privileges

Any administrator who uses the Sandata EVV Portal will be assigned a security role. Each security role is authorized to perform certain activities within their EVV account. The security role title may be changed to align with terms normally used by a provider agency, since these titles are visible to the provider agency's other Sandata EVV Portal users.

Only provider agency administrative staff who use the Sandata EVV Portal should be assigned a role as described below; employees who only work in clients' homes will not need administrative roles on the Sandata EVV Portal.

Sandata EVV Portal (Provider Agencies)

The following Sandata EVV Portal user security roles are for the DHS-provided Sandata system:

- Security Administrator:
 - This is the primary security role for the Sandata EVV system. The provider agency's contact listed in the Mail To Address field on the secure ForwardHealth Portal is automatically assigned the role of security administrator for the Sandata EVV Portal. They should be the first individual to take the EVV training. The security administrator can re-assign this role later if desired. **At least two security administrators are recommended per provider agency to:**
 - Prevent being accidentally locked out of the Sandata EVV system.
 - Ensure smooth continuation of EVV activities if one of the administrators is out of the office.
 - Users with this role are responsible for creating and managing access to the provider agency's EVV system for all other users who access that account. A security administrator has the ability to:
 - Manage and administer the specific provider agency's account in the Sandata EVV system.
 - Access the security module.
 - Create and edit all Sandata EVV users for the provider agency.
 - Create and edit user roles.
 - View client information as received from the member files transferred from DHS to Sandata.
 - View authorizations as received from authorization files transferred from DHS to Sandata.
 - Add or update additional client phone numbers and addresses.
 - View employee information transferred from DHS to Sandata.
 - Perform visit maintenance (view and edit visits).
 - Run reports.
- Coordinator: The coordinator role is for general administrative staff in a provider agency who are responsible for the day-to-day activities of the provider agency's business. A coordinator has the ability to:
 - View client information as received from the member files transferred from DHS to Sandata.
 - Add and update additional client phone numbers and addresses.
 - View employee information transferred from DHS to Sandata.
 - View authorizations as received from authorization files transferred from DHS to Sandata.
 - Perform visit maintenance (view and edit visits).
 - Run reports.

- Assistant Coordinator: This role supports the provider agency. Assistant coordinators are able to:
 - View visits but not edit.
 - Run reports.

Note on the Sandata Aggregator

The training provided in this guide will not address the Sandata Aggregator in detail. The aggregator tool is not needed by provider agencies using the DHS-provided Sandata system.

The aggregator tool is used by alternate EVV users and program payers who need to confirm that their data arrived to Sandata (and DHS) safely. Privacy settings ensure only appropriate information is accessed, in compliance with the Health Insurance Portability and Accountability Act of 1996. Refer to the DHS Alternate EVV webpage at <https://www.dhs.wisconsin.gov/evv/alternateevv.htm> for more information.

Sandata Aggregator (Alternate EVV Users/Payers/Third-Party Program Payers)

The following security roles exist in the Sandata Aggregator:

- Jurisdictional Oversight: This user role is assigned to someone who will view the entire system, including program oversight. This user can:
 - Perform visit reviews including view and playback of signatures.
 - Run reports.
- Administrator: The administrator user role is for the person in charge of administrative capabilities for other users. In the aggregator, administrators can:
 - Access the security module.
 - Create and edit Sandata Aggregator users.
 - Perform a visit review including view and playback of signatures.
 - Run reports.
- Auditor: Per general Medicaid programs software procedures, an auditor user role is assigned to someone researching specific information. An auditor may perform visit reviews, including view and playback of signatures.

4. Client Module

Remember: A member or participant in Wisconsin's service delivery is called a client in the Sandata EVV system. Sandata's term will be used here to match their screen directions.

Client information is populated in the Sandata system based on the client's authorization and information sent from DHS. This is part of a nightly file transfer from Wisconsin Medicaid to Sandata. A client's Medicaid ID is **not** identical to the Sandata client ID; they are two distinct numbers that identify a client in the Sandata EVV Portal.

Employees will need the six-digit Sandata client ID to check in and out of visits. Ensuring this client information is consistently available to employees checking in and out saves administrators' time in making adjustments later.

If a client's Medicaid ID changes, it will be reflected on the client's authorization. When this happens, the old and new Medicaid ID will be automatically connected by DHS. The Sandata EVV Portal will be updated automatically. The client's Sandata ID will not change. A change to a client's Medicaid ID will not affect an employee's ability to check in or out of a visit.

A client's information may not be in the Sandata system for reasons including:

- The client receives retroactive enrollment. This is resolved when an authorization is received within the Sandata system.
- A fee-for-service client may not have an authorization on file and has less than 50 hours of personal care. In these instances, it is appropriate to manually add a fee-for-service client to the Sandata EVV Portal.

If a client does not show in the Sandata EVV Portal after three days of the authorization's creation, the provider agency administrator should seek assistance from EVV Customer Care.

Refer to the "Client data" section of [DHS EVV administrators training webpage](#) for more information.

Add a Client Record (Fee-for-Service)

In order to accommodate fee-for-service clients who do not have an authorization on file and receive under 50 hours of service in the calendar year, a provider agency may manually add a fee-for-service client to the Sandata EVV Portal.

Refer to the "Client data" section of [DHS EVV administrators training webpage](#) for a demonstration video and PowerPoint regarding this process.

If the Sandata system receives the client's authorization later on, the manually entered client information is overwritten by the authorization information, as long as the Medicaid ID numbers match. All visit data for that client will remain.

Modify Client Data

The following items cannot be updated in the Sandata EVV Portal and must be updated through the authorization:

- Client first name
- Client last name
- Medicaid ID

Other actions that cannot be performed in the Sandata EVV Portal include adding clients other than fee-for-service clients and deleting a client.

Primary address information for a client must be updated by the client using the usual resources at their local income maintenance agency or tribe, online on the ACCESS website, by using the Information Change Report, and by updating the Supplemental Security Income (SSI) record with the Social Security Administration and/or the address with the foster care system.

Edits that can be made in the Sandata EVV Portal include:

- Adding a valid and verifiable address
- Adding a valid and verifiable phone number
- Changing the Start of Care date
- Changing client status to “Active,” “Inactive,” or “Pending”

This information will not update any other systems outside the Sandata EVV Portal. For instructions, refer to the “Client data” section of <https://www.dhs.wisconsin.gov/evv/training-administrators.htm>.

5. Employee Module

Remember: A worker in Wisconsin’s service delivery is called an employee in the Sandata EVV system. DHS will use Sandata’s term here to match their screen directions.

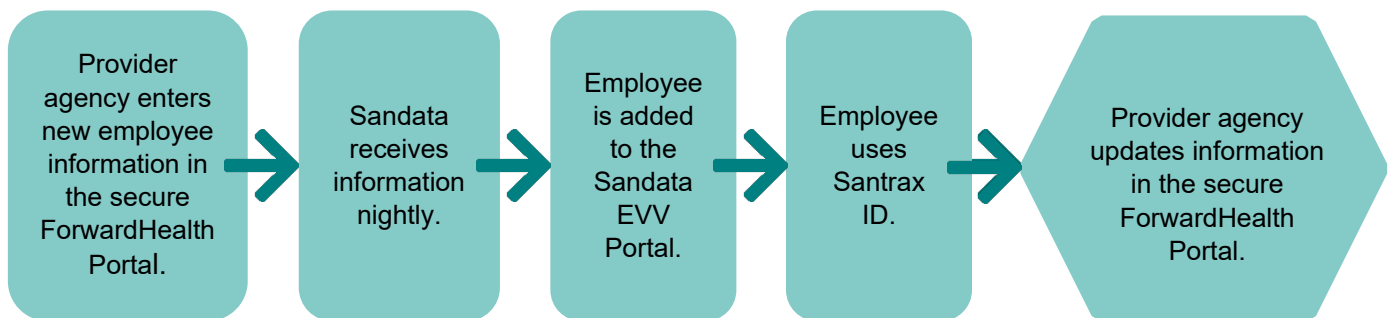
DHS recommends that provider agencies update employee information in the secure ForwardHealth Portal as part of their human resource on- and off-boarding processes.

New employees are added through the secure ForwardHealth Portal only. They cannot be added in the Sandata EVV Portal. The ForwardHealth Worker (Employee) ID video and ForwardHealth Portal EVV User Guide, which can be found in the “How can I get ready?” section of the DHS EVV training webpage at <https://www.dhs.wisconsin.gov/evv/training.htm>, describe the process of setting up and editing employee records on the secure ForwardHealth Portal.

The secure ForwardHealth Portal will generate a unique employee ID. The nine-digit ID issued on the ForwardHealth Portal will be the same as their Santrax ID. Employees will use their Santrax ID if they check in and out for EVV visits using telephonic visit verification (TVV) or fixed visit verification (FVV). (Refer to the [Telephonic Visit Verification](#) and [Fixed Visit Verification](#) sections of this guide.)

Once the employee information is added to the secure ForwardHealth Portal, it will show up on the Sandata EVV Portal the next day. This populates the Sandata system with employees' names. If an employee does not show in the Sandata EVV Portal within three days, the provider agency administrator should seek assistance from EVV Customer Care.

DHS will not send employees' Social Security numbers to Sandata. This protects employees' personal information.



After an employee is entered, provider agencies can change limited data elements on the ForwardHealth Portal. Demographic information, such as an employee's name and Social Security number, need to be changed through the Wisconsin EVV Customer Care Center. All edits to employee information within the ForwardHealth Portal will be sent to Sandata nightly.

Actions that cannot be performed in the Sandata EVV Portal include adding, changing, or deleting an employee record. These fields are also **not** able to be edited in the Sandata EVV Portal:

- Santrax ID
- Employee ID
- Employee last name
- Employee first name
- Employee email address

Providers who are self-employed must obtain both a provider agency ID (for their use as a business) and an employee ID (for their use as employee) from the secure ForwardHealth Portal.

Live-in Employees

Because of their unique circumstances, live-in employees are not required by DHS to use EVV. However, all live-in employees are required to be identified and verified by their provider agency. In fee-for-service, this is done with all authorization submissions. Live-in employees need worker ID numbers even if they are not required to use EVV.

Note: Although DHS does not require EVV use for these employees, HMOs, MCOs, and provider agencies may independently require live-in employees to use EVV. IRIS FEAs cannot require verified participant-hired live-in employees to use EVV.

Refer to the [DHS EVV resources webpage](#) for live-in worker policy information.

6. Mobile Visit Verification/Telephonic Visit Verification/Fixed Visit Verification

EVV is a new habit for employees to adopt to check in and out for a visit. For most employees, it will not replace timesheets or other documentation. (Refer to the [Using EVV as Record of Care](#) section of this chapter.) When training employees, consider how much direction they will need. Remind employees to always prioritize any immediate, medically necessary needs of the client. Vital care should not be delayed to check in or out of EVV. Use the resources on the DHS EVV training website <https://www.dhs.wisconsin.gov/evv/training.htm> including:

- Instructions on how to download the Sandata Mobile Connect (SMC) app from the Google Play Store or Apple App Store
- Instructions on how to use MVV
- Call Reference Guide (sample only; Sandata/eTrac will email the provider agency a Welcome Kit containing a provider-specific guide.)
- Sandata training videos (MVV, TVV, FVV) Worker Visit Card Template at <https://www.dhs.wisconsin.gov/evv/resources.htm>
- DHS's EVV informational video at https://www.youtube.com/watch?v=rt29rXY_td8

Employees have two main EVV options to check in and out of a visit. An employee may check in using one method and check out using a different method if needed. The two ways are:

- MVV using the SMC app.
- TVV using the client's landline.

A third method is FVV, using a small device that is fixed (that is, permanently attached) in the client's home. FVV is only approved when no other options are available. The small device

must be ordered for the client on the Sandata EVV Portal. (Refer to the [Fixed Visit Verification](#) section of this guide.)

Visits will automatically close after 25 hours to prevent visits from never being checked out. If an employee's visit lasts longer than 25 hours, they should check out and immediately check in again to continue.

Provider agencies, employees, and clients are best suited to determine which methods for EVV should be used at the local level. A labor law attorney should answer concerns about the use of personal equipment and/or technology services.

Technology Type	Internet needed at point of care?	Cell service needed at point of care?	Collects six key data points?
MVV	No	No	Yes
TVV	No	No	Yes
FVV device	No	No	Yes

Each method upholds rigorous standards for Health Insurance Portability and Accountability Act of 1996 privacy and data protections. Data that passes through the Sandata EVV system is encrypted to keep protected health information secure. Sandata is certified by the Health Information Trust Alliance.



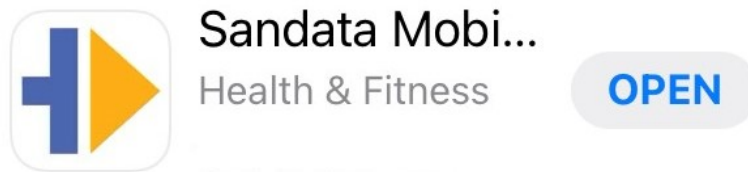
Employees can reset their own passwords prior to being locked out with the "Forgot password?" button on the app. If an employee is locked out, an administrator can reset an SMC password in the employee's Sandata EVV Portal record. Alternatively, the employee can wait an additional 15 minutes and use the Reset Password function on the app. EVV Customer Care can also help.

Mobile Visit Verification

MVV is the preferred method for collecting visit information because it is efficient and more flexible in where it can be used. The SMC app can be downloaded free of charge from either the Apple App Store or the Google Play Store.



If an employee works at several provider agencies, they can set their SMC passwords to be the same or choose a different password for each agency's EVV account. (Refer to [Appendix D](#) of this guide for details about choosing a password for the SMC app.) The employee's



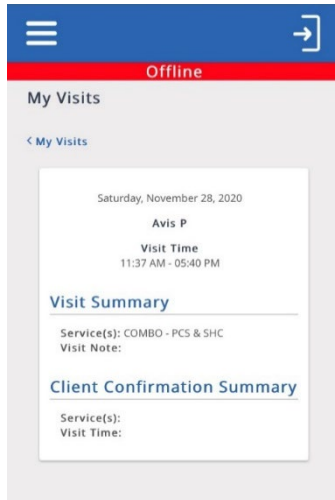
email, as originally sent to the Sandata EVV Portal from the secure ForwardHealth Portal, will serve as their username for SMC.

The mobile app uses GPS data during check in and check out only. It does not track an employee's location before, during, or after a visit. The app will automatically close after five minutes, further protecting privacy.

The first time the employee logs in to the SMC app should be when they are connected to the internet. This ensures they are able to start a future visit using either online or offline mode.

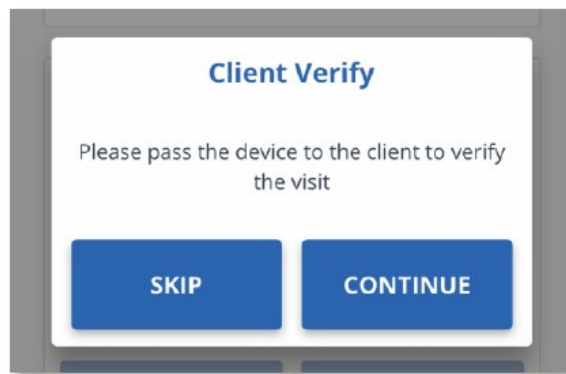
Sandata uses the term "unknown client" when the client information is not loaded in the Sandata system. This does not mean the client is not known to the provider agency or employee. An unknown client could result from an employee making an entry error when typing in the Sandata client ID or if the client's authorization is not on file. (Refer to the [Client Module](#) section of this guide.) This error is corrected in the Sandata EVV Portal under Visit Maintenance.

An “unknown client” may also be the result of the SMC app being used offline—that is, without Wi-Fi or cell service. A red band with the word “Offline” will appear at the top of the app when this happens.



The employee can continue to use the app to collect the remainder of the visit data. The administrator will need to add the client information to the visit in the Sandata EVV Portal under Visit Maintenance.

If a provider agency does not require tasks and client verification data to be collected with EVV, employees may click Skip on the app’s screen.



Telephonic Visit Verification

TVV is used for recording visits using a landline or fixed Voice over Internet Protocol (VoIP) phone. If the phone used is not on the client’s record within Sandata, an exception will show on the Sandata EVV Portal. Correcting an exception requires extra administrative time to make sure the visit data is complete. (Refer to the [Visit Maintenance](#) section of this guide.) Cell phones should **not** be used for TVV. The Sandata EVV system needs to confirm

location using a landline or fixed VoIP connection, similar to the 911 emergency system, which it cannot do using a cell phone.

After the following instruction of the TVV section, provider agencies not requiring tasks or client verification to be reported during a visit should instruct their employees to hang up after confirming the service code:

Santrax will say: "You entered [Service]. Please press 1 to accept, 2 to retry."

Please press 1 to accept, 2 to re-enter

Santrax will say: "Enter number of tasks."

Hang up



Fixed Visit Verification

FVV uses a small electronic device that is fixed to a surface in a client's home and generates codes containing visit data. The generated codes, or visit verification numbers, must be used when the employee calls in at a later time to record the visit.



FVV devices are the data collection method of last resort. A device should only be requested by the provider agency or FEA if services are anticipated to be authorized for more than 60 days and all of the following criteria are met:

- The client does not have a landline or fixed VoIP home phone.
- The employee does not have a smartphone or tablet device that would support SMC for MVV data collection.
- The client does not have a smartphone or tablet device that would support SMC for MVV data collection.
- The client has a smartphone or tablet device, but it is not available for EVV purposes.

Provider agencies or FEAs may request an FVV device through the Sandata EVV Portal. The provider agency or FEA will be required to attest that the situation meets the above criteria and that the device will remain in the home of the client.

FVV devices will be sent directly to the client's home address with instructions for the client and the employee. The device must be attached to a surface within the client's home.

The following FVV criteria may also apply:

- If a client is receiving EVV services from more than one provider agency, the client will need a device for each provider agency or FEA.
- If a client changes provider agencies or FEAs, a new device must be requested for the new client and provider agency or FEA combination.

- If the client moves to a new home **and** retains the services of their provider agency or FEA, the client should take the device to the new home.

Before the device arrives, an administrator can manually enter visits into the Sandata EVV Portal. Documentation will be required for these manual entries.

Devices must be returned if:

- The employee has access to another EVV method.
- The client is no longer authorized to receive services.
- The provider agency is no longer authorized to provide the services.
- The device is not used for six months.

To return the device, the provider agency or FEA should contact Wisconsin EVV Customer Care. Sandata will send a return package directly to the client's home.

If the device is not used for six months, DHS will request the return of the device.

If a device is lost, stolen, or damaged, the provider agency or FEA should contact Wisconsin EVV Customer Care to request a new device. A replacement device will be issued from Sandata. Until the replacement device is received, the provider agency will need to manually enter the EVV data and keep paper records that support the need for manual entry.

The DHS Office of Inspector General will closely monitor the use of FVV devices.

For FVV, the provider agency or FEA should consider any guidelines they would like their employees to use for recording the check-in and check-out code numbers and calling in the codes (such as who will call in the codes and when the codes will be called in). Options may include asking employees to call in codes the same day services are provided or turn in visit information to an office staff person to call in. The codes expire and cannot be called in after seven days.

A best practice is to call in the codes daily to keep the Sandata EVV Portal up to date. The provider agency or FEA should be sure to provide employees with the tools they need to be successful with provider agency or FEA guidelines. (Refer to [Appendix E](#) and [Appendix F](#) of this guide for sample charts employees can use to track EVV data corrections and collect FVV data.)

Visit Service Selection

Refer to the chart in [Appendix G](#) of this guide. The chart shows the codes that identify which broad services are provided to clients. The appropriate codes should be entered during a

TVV call to identify the service. The chart also shows how service options will be displayed for selection in the SMC app for an MVV check-in.

Note: The COMBO—PCS & SHC code is only used in the IRIS program and only if both personal care services and supportive home care services are provided by the same employee for the same payer.

Using Electronic Visit Verification as Record of Care

After hard launch, fee-for-service provider agencies may choose to capture the employee record of care within EVV. To do so, the provider agency must require the task list, notes (as appropriate), and client signatures from each visit. If a provider agency decides to use EVV to capture the employee record of care, that decision must apply to all visits captured by all employees using EVV within that provider agency. Provider agencies should check with their HMO, MCO, or FEA regarding EVV requirements for tasks and client signatures:

- Task list: Tasks are the actual activities performed during the visit. Employees can select the tasks they performed from a standard task list that the Sandata EVV system provides:
 - If using the SMC app, the employee selects as many tasks as appropriate based on the Task Description chart in [Appendix H](#) of this guide.
 - For TVV and FVV, the employee will select the tasks performed by entering the TVV service code numbers from [Appendix H](#) of this guide. The system will validate their keypad entry during the phone call and, if valid, read back the text in the Task Description column.
- Notes: General comments about the care provided can be entered into the Notes section. However, this section is not meant to collect medical information, communicate a change in condition, or communicate a need for medical care.
- Client signature: If a provider agency decides their employees will use this functionality, the employee will ask the client to sign with their fingertip or a voice recording.

7. Visit Maintenance

Electronic Visit Verification Visit Lifecycle

After EVV data is captured and sent to Sandata by MVV, TVV, or FVV, it is available for visit maintenance on the Sandata EVV Portal. Once all information is accurate and complete, a visit is considered to have a verified status. A verified visit will automatically be sent from Sandata to Wisconsin Medicaid. (Refer to the [Visit Exceptions](#) section of this guide for instructions on how to correct information.) The provider agency can bill the visit as usual.

It is a best practice to make sure a visit is in a verified status before submitting claims. There may be a one-day delay for the claim to be matched to the EVV data. Be aware that claim

processing information is not relayed back to the Sandata EVV system. Although the Sandata EVV Portal navigation tools may list such billing features, they are not part of Sandata's functionality for DHS.

Employees can save time and effort by capturing accurate and complete visit information right from the start. Over time, and with follow-up, good EVV habits will develop. Refer to the Electronic Visit Verification (EVV) Lifecycle Flyer, P-03124 at <https://www.dhs.wisconsin.gov/publications/p03124.pdf>.

Administrators can review, modify, and correct visits on the Sandata EVV Portal. Provider agencies should consider taking these actions if a visit does not appear in the Sandata EVV Portal:

- Check with the employee for connectivity or other issues.
- Verify call-in and call-out times with the employee.
- If needed, manually enter the visit, and document the reason for a manual entry.

Administrators should review visit exceptions for patterns. (Refer to the [Visit Exceptions](#) section of this guide.) Where patterns are observed, the provider agency can offer retraining and other resources to employees to help build confidence and good habits for EVV use.

Additionally, please note the following:

- All modified visits may be subject to additional DHS scrutiny as they are not fully electronically captured at the time of service as required by the 21st Century Cures Act.
- The Centers for Medicare & Medicaid Services requires that written documentation must be maintained for all changes made to visits.
- Do **not** use the memo section of visit verification as proof of documentation. Separate documentation is required. EVV does not change written documentation retention requirements.
- EVV does not eliminate the need for physician orders, timesheets, or a plan of care.
- The fee-for-service program requires that care only be provided in the client's home. HMOs may also require services to be provided in the client's home. That is unchanged with EVV. In all other programs, EVV is required regardless of where services are provided, whether in the community, in the home, or both.

Visit Exceptions

Visit exceptions occur when the EVV system identifies an information gap for a visit. When this occurs, a provider agency administrator with the appropriate visit maintenance security privileges can document missing or incorrect data for the visit. In some cases, the administrator can acknowledge that the exception occurred to resolve it. More than one

exception can apply to a single visit. For assistance with specific exceptions, and tips for how to prevent them, refer to PowerPoint 9: EVV Visit Maintenance, P-02754, in the “Visit maintenance” section of the [EVV training webpage for other provider agency administrators](#).

Visit Status Categories

The Sandata EVV system uses categories to indicate the status of a visit:

- An “in process” visit is one that is still occurring. A check out for this visit is not documented, and it is not beyond the 25-hour limit.
- An “incomplete” visit is missing data elements, resulting in one or more exceptions. An administrator must clear all visit exceptions in order to change the status of the visit from incomplete to complete.
- A “verified” visit has all required data **and** any resulting exceptions have been resolved.
- An “omit” status can be used by provider agencies when a visit is captured in error. Visits cannot be deleted from the Sandata EVV Portal. Instead, using the omit status can help filter these accidental records so administrators do not need to edit them.

Exceptions can be resolved with:

- Fix: The information must be corrected or added by an administrator in the Sandata EVV Portal for the visit to be considered complete.
- Acknowledge: The missing information must be acknowledged by an administrator in the Sandata EVV Portal for the visit to be considered complete.

Refer to Visit Exceptions in [Appendix I](#) of this guide.

Please note GPS location does not flag as an exception that will prevent a visit from being verified at this time. Refer to GPS section of PowerPoint 9: EVV Visit Maintenance, P-02754, in the “Visit maintenance” section of the [EVV training webpage for other provider agency administrators](#) for more details.

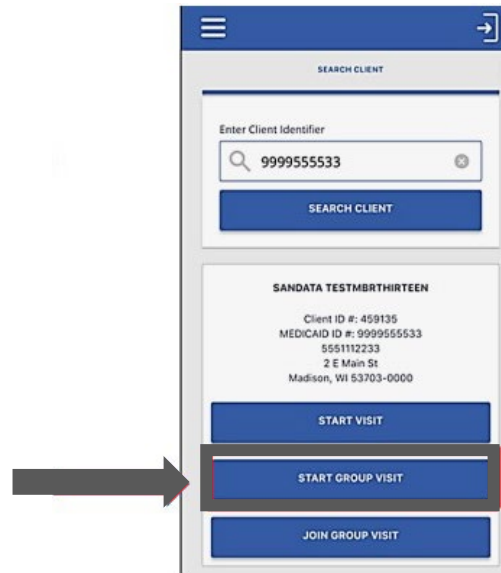
Reason Codes

Reason codes are used when making all visit maintenance changes or updates in the Sandata EVV Portal. This includes fixing exceptions and making manual changes to visits. Sandata EVV Portal users who clear exceptions can add a note to provide additional clarification when reason codes are selected. In fact, for certain reason codes, the note may be required in order to clear the exception. This does not replace the need for written documentation as required by a provider agency’s specific program.

Refer to the chart in [Appendix J](#) of this guide. It lists the reason codes for the DHS EVV solution and shows whether or not the code requires a note to be entered. Reason code descriptions may be shortened to fit on the Sandata EVV Portal.

8. Group Visits

DHS defines a group visit as an employee providing care to several clients at the same address during the same visit. If more than one employee is providing services at the same time, each employee should start their own visit. Sandata's "Join a Group Visit" option should not be used in Wisconsin. Instead, employees should use the "Start Group Visit" option. A group visit code will appear on the SMC app but does not need to be used.



As with other visits in EVV, if a group visit lasts more than 24 hours, the employee should check out and in again. Visits will automatically close after 25 hours to prevent visits from never being checked out, and the DHS-provided EVV system will create an exception that will need to be resolved.

A group visit may be ended for each client individually or all at the same time.

9. Reports

DHS recommends that provider agencies review the following reports daily:

- The Exception Log:
 - A single visit may have multiple exceptions to resolve.
 - All exceptions must be fixed or acknowledged for a visit to become verified.
 - Only verified data is eligible for billing.
- The Employee Visit Log, where provider agency administrators can verify all scheduled visits were recorded in the EVV software.

Note: Reports referencing claims and scheduling do not provide any results. These functions are not part of the DHS EVV solution.

Employee Visit Log Report

Sandata has created the Employee Visit Log report specifically for DHS. It can be found as a date range report. The date range can be for any period of 31 days or less. Any visit in a verified status is included in this report. (A verified visit means no exceptions are present.)

The Employee Visit Log report data includes these visit details:

- Date
- Service
- Time in
- Time out
- Hours
- Status
- Tasks
- Employee name
- Location in and out (GPS coordinates for MVV visits; phone number for TVV visits)
- Employee Santrax ID
- Client name
- Sandata client ID and Medicaid ID
- Notes
- Whether or not a signature was captured (Yes or No)
- Total visit hours



This report can capture all elements in a fee-for-service employee record of care if an employee collects that information.

Report Parameters

Account: Community Services (91023)
For: 7/23/2020 - 8/6/2020 11:59:59 PM

Employee Visit Log

VISIT								LOCATION IN		LOCATION OUT		EMPLOYEE			CLIENT		
PRG	SRV	DATE	TIME IN	TIME OUT	HOURS	STATUS	LATITUDE, LONGITUDE	PHONE #	LATITUDE, LONGITUDE	PHONE #	NAME	MEDICAID ID	SANTRAX ID	NAME	ID / MEDICAID	SIG	
WIMCO	T1020	7/29/2020	10:56 AM	11:07 AM	0.18	Verified		8473949693		8473949693	SHERPA, BILLU	100006166	100006166	COX, CINDY	854936 / 3543870579	N	
Task List: 0200																	
WIMCO	T1020	8/5/2020	8:50 AM	9:06 AM	0.27	Verified				8473949693	SHERPA, BUMI	100006176	100006176	COX, CINDY	854936 / 3543870579	N	
Task List: 0210																	
WIMCO	T1020	7/29/2020	9:30 AM	9:43 AM	0.22	Verified		9988887777		9988887777	SHERPA, CHILLI	100006167	100006167	COX, CINDY	854936 / 3543870579	N	
Total Hours:					0.67												



08/06/2020 10:28:26

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Appendix

Appendix A—Payer List

The following table is a list of payers and the abbreviations used for them on the Sandata EVV Portal.

Sandata Payer Wisconsin DHS Program Payer ID	Sandata Program Name Wisconsin DHS Delivery System	Delivery System	Program Payer Name
WIFFS	Fee-for-service	Fee-for-service	Wisconsin Fee-for-Service
ANTBCBS	WIHMO	HMO	Anthem Blue Cross and Blue Shield
CAREWI	WIHMO	HMO	Care Wisconsin Health Plan, Inc.
CCOMMHP	WIHMO	HMO	Children's Community Health Plan, Inc.
DEANHP	WIHMO	HMO	Dean Health Plan
GHCEC	WIHMO	HMO	Group Health Cooperative of Eau Claire
GHSCSW	WIHMO	HMO	Group Health Cooperative of South Central Wisconsin
ICAREBC	WIHMO	HMO	Independent Care Health Plan (iCare BadgerCare)
ICARESSI	WIHMO	HMO	Independent Care Health Plan (iCare SSI)
MERCYCARE	WIHMO	HMO	MercyCare Insurance Company
MHSHW	WIHMO	HMO	MHS Health Wisconsin
NHP	WIHMO	HMO	Network Health Plan
QUARTZ	WIHMO	HMO	Quartz Health Solutions, Inc.
SECURITY	WIHMO	HMO	Security Health Plan of WI, Inc.
TRILOGY	WIHMO	HMO	Trilogy Health Insurance
UHCWI	WIHMO	HMO	United Healthcare of Wisconsin, Inc.

Sandata Payer Wisconsin DHS Program Payer ID	Sandata Program Name Wisconsin DHS Delivery System	Delivery System	Program Payer Name
WIMOLINA	WIHMO	HMO	Molina Health Care
CCIFC	WIMCO	MCO	Community Care Family Care
CCIFCP	WIMCO	MCO	Community Care Partnership Family Care
ICAREFCP	WIMCO	MCO	Independent Care Health Plan (iCare Partnership)
INCLUSA	WIMCO	MCO	Inclusa, Inc.
LAKELAND	WIMCO	MCO	Lakeland Care, Inc.
MCFC-CW	WIMCO	MCO	My Choice Family Care, Inc.
GTINDEP	WIIRISFEA	IRIS	GT Independence
ILIFE	WIIRISFEA	IRIS	iLIFE
OUTREACH	WIIRISFEA	IRIS	Outreach Health Services
PREMIER	WIIRISFEA	IRIS	Premier Financial Management Services



Appendix B—Covered Services

The following covered services table lists all of the covered services included in the DHS EVV Program. Please note that the times listed reflect the units in which these service codes are billed. They are not how often a worker needs to access EVV.

Service Description	Service Code
Personal Care Svc/15min	T1019
Personal Care/Day	T1020
Supportive Home Care/15min	S5125
Supportive Home Care/Day	S5126
COMBO—PCS & SHC*	COMBO

* Used in IRIS if both self-directed personal care services and supportive home care are provided by the same employee, for the same participant.



Appendix C—Language List

The following table indicates the supported languages and the order in which they appear for use in the SMC app and TVV.

Supported Languages	Presentation Order
English	1
Egyptian Arabic	2
Burmese	3
Mandarin Chinese	4
French	5
Hindi	6
Hmong	7
Laotian	8
Nepali	9
Russian	10
Serbian	11
Somali	12
Spanish	13
Swahili	14
Vietnamese	15



Appendix D—Security Settings

This section contains the program requirements specified for logins and passwords.

For the Sandata EVV Portal:

- Username: The email address entered during user account creation.
- Password:
 - Must be a minimum length of 12 characters.
 - Must contain at least one uppercase letter.
 - Must contain at least one lowercase letter.
 - Must contain at least one number.
 - Must contain at least one special character.
- A password is valid for 60 days.
- The last 12 passwords are stored in the system and cannot be re-used.
- If a user is locked out, the provider agency's security administrator can reset the password.

For SMC:

- Username: The email address entered during account creation.
- Password:
 - Must be a minimum length of 12 characters.
 - Must contain at least one uppercase letter.
 - Must contain at least one lowercase letter.
 - Must contain at least one number.
 - Must contain at least one special character.
 - A password is valid for 60 days. A password expiration warning message begins appearing 10 days before expiration.
 - The application timeout warning message appears after five minutes. The timeout warning will display for two minutes. If the app remains idle after two minutes, the user is logged out.
- Application Lock Out occurs after three unsuccessful sequential login attempts within 15 minutes. This will require a provider agency administrator or EVV Customer Care to reset the password. Alternatively, the employee can wait an additional 15 minutes and use the Reset Password function on the app.
- Security Questions: Four security questions must be set up. These are later answered if resetting a forgotten password.



Appendix F—Fixed Visit Verification Data Collection Log

Make copies of this chart to track FVV data. Make sure the codes are called in to the toll-free phone number assigned. Service codes are listed in [Appendix G](#), and task IDs and descriptions are listed in [Appendix H](#).

(Insert your toll-free numbers here: _____ or _____)

Member/Participant Name or Sandata Client ID:						
Worker name and Santrax ID	Date of FVV device use	Write in these details from the FVV visit:				Date verification codes were called in
		Verification code received when checking in	Verification code received when checking out	Service code	Tasks and notes (if required)	

Appendix G—Services to Select During Telephonic Visit Verification Call and Mobile Visit Verification

The following table lists the codes an employee enters during a TVV call to identify the service, and the service code list displayed in the SMC app for an MVV visit check in. Provide this chart to employees using TVV and FVV.

Service Code	Selection Code on TVV Call	Telephonic Prompt for Read Back	SMC Service Code
T1019	10	Personal Care Services, 15 minutes	Personal Care Svc/15min
T1020	25	Personal Care Services, per day	Personal Care/day
S5125	15	Supportive Home Care, 15 minutes	Supportive Home Care/15min
S5126	20	Supportive Home Care, per day	Supportive Home Care/Day
COMBO (IRIS only)*	30	Both Personal Care and Supportive Home Care service, 15 Minutes	COMBO-PCS & SHC*

* Used in IRIS if both self-directed personal care services and supportive home care services provided during the visit by the same employee, for the same payee.



Appendix H—Tasks Performed

After hard launch, fee-for-service provider agencies may choose to capture the employee record of care within EVV. To do so, the provider agency must require the task list, notes (as appropriate), and client signatures from each visit. Tasks are the actual activities performed during the visit.

In the SMC app:

- The employee selects as many tasks as appropriate based on the Task Description column in the following table.
- For each selected task, the employee will specify if it was completed.

For Sandata TVV and FVV:

- The employee will enter in how many tasks were completed.
- The employee will enter a task ID for each task completed.
- The system will validate their keypad entry and, if valid, read back the text in the Task Description column.

Task ID	Task Description
100	Shower/Bathing
105	Dressing/Changing
110	Prosthetics/Splints/TEDS
115	Grooming
120	Assist With Feeding
125	Mobility
130	Transferring
135	Toileting
200	Bowel Program (medically oriented task [MOT])
205	Catheter Site Care (MOT)
210	Complex Positioning (MOT)
215	Feeding Tube Site Care (MOT)
220	Glucometer (MOT)



Task ID	Task Description
225	Medications: Assist/Remind (MOT)
230	Range of Motion (MOT)
235	Respiratory Assistance (MOT)
240	Skin Care (MOT)
245	Tube Feeding (MOT)
250	Vital Signs (MOT)
255	Wound Care (MOT)
300	Eyeglass/Hearing Aid(s) Care
305	Housekeeping
310	Laundry
315	Meal Prep/Purchase Groceries



Appendix I—Visit Exceptions

Visit exceptions occur when the EVV system identifies a gap in visit data. When this occurs, a Sandata EVV Portal user with the appropriate visit maintenance security privileges will be able to either document missing or incorrect data for the visit or acknowledge that the exception occurred and was manually reviewed using Visit Maintenance. More than one exception can apply to a single visit.

For each exception, the following have been defined:

- Fix: Visit information must be added to be considered complete.
- Acknowledge: Incomplete visit information must be acknowledged by a system user to be considered complete.

Exception	Setting
Invalid Service	Fix
Missing Service	Fix
Unauthorized Service	Fix
Unknown Client	Fix
Unknown Employee	Fix
Unmatched Client Phone / ID	Acknowledge
Visits Without In-Calls	Fix
Visits Without Out Calls	Fix



Appendix J—Reason Codes

Reason codes are used when making Visit Maintenance changes or updates, including fixing or acknowledging exceptions and when making manual changes to visits. Sandata EVV Portal users can add an electronic note to provide additional clarification when reason codes are selected. For certain reason codes, this may be required. **This does not replace the need for written documentation as required by a provider agency’s specific program.**

The following table lists the reason codes for the DHS EVV program and whether or not the code requires an electronic note to be entered.

Reason code descriptions may be abbreviated in the Sandata EVV Portal and the Sandata Aggregator system.

Reason Code Description	Electronic Note Required? (Y/N)
Caregiver Error	No
Member Unavailable	No
Mobile Device Issue	No
Telephonic Issue	No
Member Refused Verification	No
Service Outside the Home	No
Missing in System	No
Other	Yes



Resources

DHS EVV

- Webpage at <https://www.dhs.wisconsin.gov/evv/index.htm>
- Main source for all EVV information, including:
 - EVV program overview
 - Informational video at https://www.youtube.com/watch?v=rt29rXY_td8
 - Training resources at <https://www.dhs.wisconsin.gov/evv/training.htm>
 - Email list subscription at https://public.govdelivery.com/accounts/WIDHS/subscriber/new?topic_id=WIDHS_190

ForwardHealth Portal

- [ForwardHealth Provider Portal Account User Guide](#) (Refer to this user guide for information about establishing an account on the ForwardHealth Portal.)
- [ForwardHealth Electronic Visit Verification User Portal Guide](#)
- Training videos at <https://www.forwardhealth.wi.gov/WIPortal/content/provider/training/TrainingHome.htm.spage>

Sandata Learning Management System

- Learn how to sign up for DHS-provided Sandata trainings at <https://www.dhs.wisconsin.gov/non-dhs/dms/evv-sandata-training-registration-quick-guide.pdf>
- Find webinar and on-demand self-paced learning videos for the Sandata EVV Portal Provider Agency Training at <https://www.sandatalearn.com?KeyName=WIEVVAgency>.

Note: On-demand training videos may differ from how the DHS-provided EVV solution functions in Wisconsin. Refer to this guide for Wisconsin-specific EVV information.

Questions About EVV Training

- Technical Support: Wisconsin EVV Customer Care at 833-931-2035 or vdxcontactevv@wisconsin.gov
- General training questions: Wisconsin EVV Customer Care at 833-931-2035 or vdxcontactevv@wisconsin.gov



Questions About the Sandata EVV Portal

Direct questions about the Sandata EVV Portal to Wisconsin EVV Customer Care to:

- 833-931-2035
- vdxs.contactevv@wisconsin.gov

Questions About the Secure ForwardHealth Portal

- How to receive an agency ID number and navigate the secure ForwardHealth Portal at <https://www.dhs.wisconsin.gov/evv/training.htm>
- How to assign an ID number to employees at <https://www.dhs.wisconsin.gov/evv/training.htm>
- Wisconsin EVV Customer Care at 833-931-2035 or vdxs.contactevv@wisconsin.gov

Questions About MVV, TVV, and FVV

- Resource materials available at <https://www.dhs.wisconsin.gov/evv/training.htm>
- Specific topics in this Wisconsin EVV Supplement Guide
- Wisconsin EVV Customer Care at 833-931-2035 or vdxs.contactevv@wisconsin.gov

Questions About DHS Policy Regarding EVV

- DHS EVV policy available at <https://www.dhs.wisconsin.gov/evv/resources.htm>
- Wisconsin EVV Customer Care at 833-931-2035 or vdxs.contactevv@wisconsin.gov

Questions About Using an Alternate EVV Vendor

- DHS Alternate EVV webpage at <https://www.dhs.wisconsin.gov/evv/alternateevv.htm>
- Sandata Alternate EVV help at 855-705-2407 or wialtevv@sandata.com

Other EVV Questions

Contact Wisconsin EVV Customer Care with any other EVV questions at:

- 833-931-2035
- vdxs.contactevv@wisconsin.gov

