Sandata Electronic Visit Verification Portal: Modify Client Data

November 2023
Wisconsin EVV

WISCONSIN DEPARTMENT of HEALTH SERVICES

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Welcome to Sandata Electronic Visit Verification Portal: Modify Client Data training.

Agenda

- Client Information Exchange
- Reasons for Modifying Client Data
- Modifying Client Data
  - Add Valid and Verifiable Address
  - Add Valid and Verifiable Phone Number
  - Change Client Status
  - Change Start of Care (SOC) Date
- Available Resources

In this training we will review :
How client information is exchanged, reasons for modifying client data, how to modify client data, such as adding a valid and verifiable address, adding valid and verifiable phone number, changing a client status, changing the start of care date and review available EVV resources.

Client Information Exchange

Client information exchange:

It's important to start out with an understanding of how the information is loaded to the providers' Sandata Portal. Let's take a peek behind the tech curtain!

Client Information Data

- The Wisconsin Department of Health Services (DHS) sends HIPAA compliant client information to Sandata based on the client's:
  - Approved authorizations for EVV services.
  - Medicaid client enrollment file.
- Both authorization and client files are sent to Sandata nightly.

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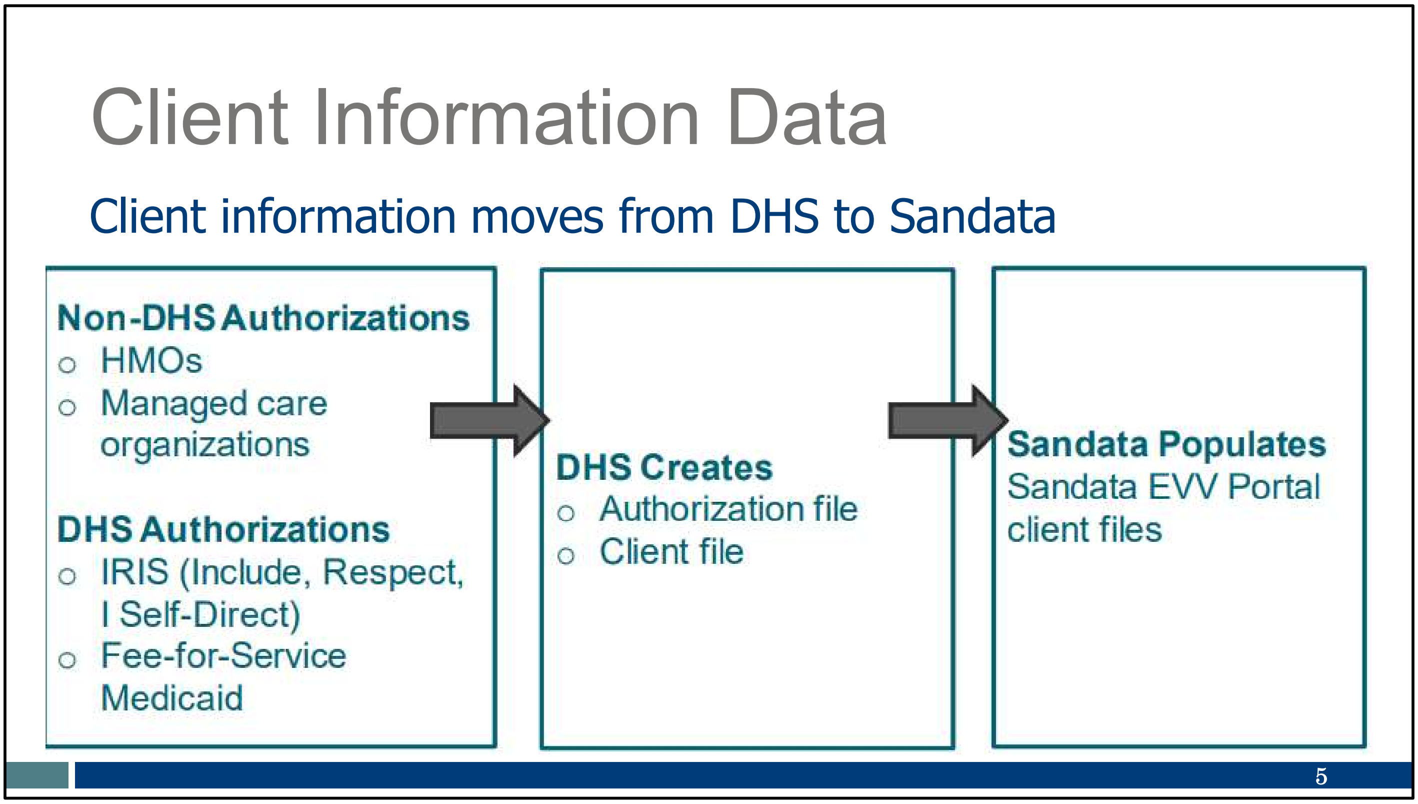
Wisconsin Department of Health Services (DHS) receives authorizations from fee for service, HMOs, MCOs and IRIS.
DHS uses the authorization to identify which client's information needs to be sent to Sandata. DHS then creates a client file that includes only the information Sandata needs for EVV in order to be compliant with HIPAA laws.
For example: If the authorization is for an EVV-required service, DHS sends the client information to Sandata. Sandata places the client information into the correct provider's Sandata EVV Portal account.

Both authorization and client files are sent to Sandata nightly.



Client information moves in one direction, from DHS to Sandata.
This graphic is showing how the information moves:

Authorization files are gathered from Non-DHS, (HMO and Managed care organization (MCO)) and DHS, (IRIS and fee for service Medicaid) sources.
DHS then creates a master authorization file gathering the client demographic for those files and sends to Sandata.
Sandata then populates the correct provider’s Sandata EVV Portal client file.

Here are some common questions about this process:

How long does an approved authorization take to get from an HMO or MCO to Sandata? One day to go to DHS, and a second day to go to Sandata. If an expected authorization doesn’t populate a provider’s Sandata EVV Portal in two days, contact EVV Customer Care.

What about clients whose service is allowed by policy without an authorization? That client’s information may not be automatically sent to the Sandata system. We’ll have more about that scenario in the “Adding Required Authorization Information in the Sandata EVV Portal” training.

Will information I add about a client in the Sandata EVV Portal flow back to other systems? No. It is important to understand that information from DHS only flows one way, to Sandata. This information will only update the Sandata EVV Portal. For example, adding an address for a client in the Sandata EVV Portal will not send that new address back to DHS or update any Medicaid systems. The usual methods for updating other systems are still in place.

Reasons for Modifying Client Data

Why might providers need to update client information in the Sandata EVV Portal?

Reasons for Modifying Client Data

Providers may need to update certain client data by:

- Adding an additional valid and verifiable client address for mailing the fixed visit verification (FVV) device or better location accuracy.
- Adding a valid and verifiable phone number to prevent "unknown client" exception.
- Changing the client's status from pending to active:
  - Easily identify new or updated client authorizations.
  - Start of care date to match first EVV visit.

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We'll have more about each of these points later in this presentation:

If the client's address is incorrect, while waiting for the client to update the Medicaid system, the provider could add a valid and verifiable address to the Sandata EVV Portal before ordering the fixed visit verification (FVV) device. Adding the additional location also shows acknowledgement of different allowable locations of care.

Another reason may be to add a valid and verifiable phone number to prevent "unknown client" exception, for example—If the service policy allows services in another location and there is a landline phone that can be used for recording EVV visit information, providers may add that phone number.

The client status can also be updated. When a client is added to the provider's Sandata EVV Portal they are loaded with a "Pending" status. The pending status does not need to be changed. Clients listed in a pending status will not prevent the employee from entering EVV visit information. However, changing the client status from "pending" to "active" can help providers easily identify new or updated client authorizations.

Also, changing the client status opens up the ability to edit the start of care date and end of care date. The start of care date is auto populated as the date the client is added to the Sandata EVV Portal. That may not match the first EVV visit date. For example, if the payer sends an authorization on January 20th but backdates the services to begin January 15th, the Sandata start of care date will automatically be the date the file ~~it~~ was received, January 20th. But if the provider began providing services on January 15th, as the authorization allowed, the start of care date will need to be changed to January 15th to prevent an exception flag for those earlier visits. As always, providers should pay close attention to the payer-approved authorization start dates. Services should not begin prior to the date approved in the authorization.

Reasons for Modifying Client Data

- A client is required to keep their address current for Medicaid benefits. This has not changed with EVV.
- It is important that the client also keep their address current with all other applicable entities including the Social Security Administration and the foster care system.
- Helpful directions for phone and address changes and links can be found on the EVV FAQ webpage at www.dhs.wisconsin.gov/evv/faq.htm

Keep in mind the official process for changing a client's address and phone number has not changed with EVV. Clients are required to keep their information up to date through their usual resources: the client's local income maintenance agency or tribe, online through the client's ACCESS account, or by using the Medicaid Change Report (F-10137). As always, IRIS participants can also update address and phone numbers with their IRIS Consultant Agent (ICA).

It is important that the client also keep their address current with all other applicable entities including the Social Security Administration and the foster care system.

The member/participant section of the EVV FAQs, contains the usual directions and links for the client to update their information.

Reasons for Modifying Client Data

If the client has not updated their address, the provider can add a valid and verifiable address or phone number to the Sandata EVV Portal client profile.

- This will only update Sandata.
- It will not update ACCESS, SSA, or any other system.
- A "valid and verifiable" phone number means the client's landline or fixed Voice over Internet Protocol (VoIP) phone.

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Providers can add a valid and verifiable address or phone to the Sandata EVV Portal. As we just mentioned previously, the client information flows one way and any changes made in the Sandata EVV Portal will not update the Medicaid file or any other systems.

Phone numbers should be a landline or Voice over Internet (VoIP) phone. VoIP imitates a traditional landline: a base is plugged in to the wall or modem.

Modifying Client Data

Moving on, I will talk about what client information can be modified and how to search for your client.

Modifying Client Data

- These optional client data can be modified in the Sandata EVV Portal:
  - Additional valid and verifiable addresses
  - Additional valid and verifiable phone numbers
  - Any client email addresses
  - Client status

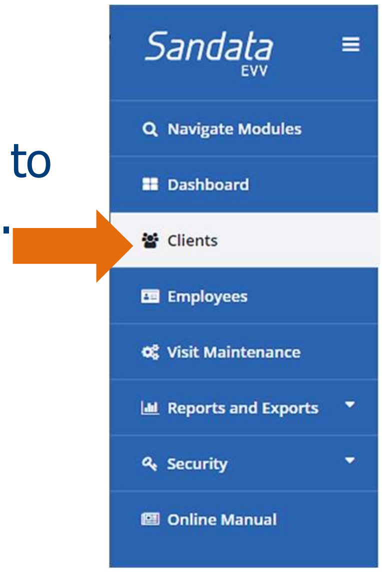
To ensure integrity of client data from DHS remains, modifying client data in the Sandata EVV Portal is limited.

These optional client data fields can be modified in the Sandata EVV Portal:

Additional valid and verifiable addresses
Additional valid and verifiable phone numbers
Client email addresses and
Client status

Modifying Client Data

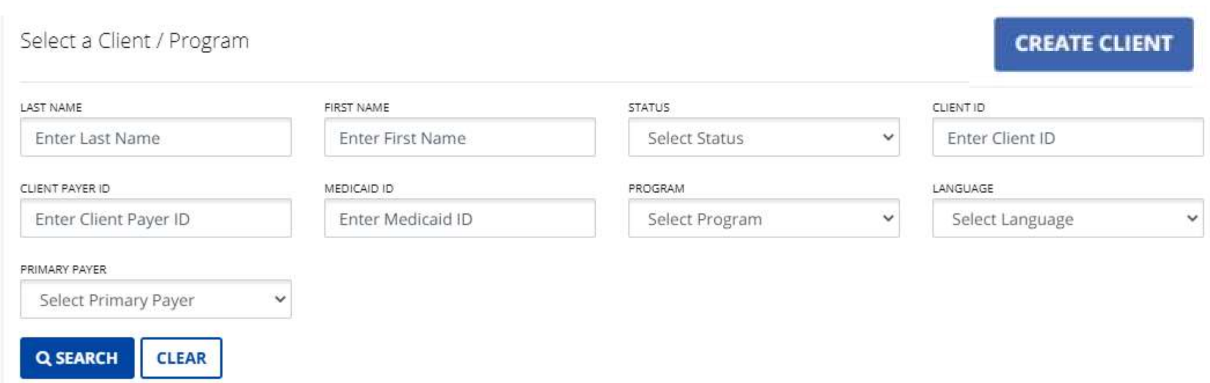
- Log in to the Sandata EVV Portal.
- From the navigation panel, click **Clients** to access the Client/Program search screen.



To modify client data:
Log in to the Sandata EVV Portal.
To access client records, click Clients from the navigation panel. The Client/Program search screen will be displayed.

Modifying Client Data

Search for client by entering criteria in any of the data fields or simply select "**Search**" for the entire listing of the provider's EVV clients.



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Search for the client entering criteria in any of the data fields or simply select 'search' for the entire listing of all the provider's EVV clients.

Modifying Client Data

Click Edit icon next to the desired client name.

« ‹ 1 › »

Showing 1-3 of 3 entries

Name	Program	Status	Supervisor	Medicaid ID	Client Payer ID	As Of	SOC	EOC	Services
+ client one, test	Fee For Service	Pending		9876543210		1/26/21			T1019
+ client two, test	Fee For Service	Pending		0123456789		1/26/21			T1019
+ client, test one	Fee For Service	Pending		9987654321		1/26/21			T1019

To edit client data, click on the edit pencil icon next to the client name.

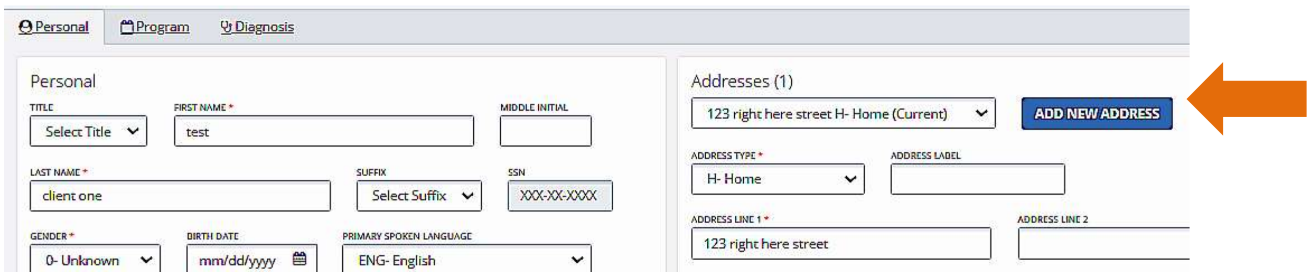
Tip: A client may have more than one line here if they have authorizations with different programs. Modify the information for each line needed, separately.

Adding New Valid and Verifiable Address

Let's look at how to add an updated valid and verifiable client address.

Adding New Valid and Verifiable Address

From the client Personal tab, click **Add New Address** button



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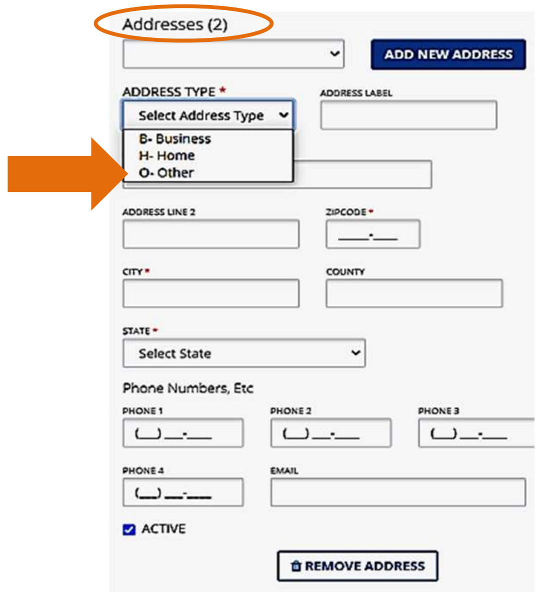
Select the Add New Address button to add an additional address.

Adding New Valid and Verifiable Address

- Select Address Type **O- Other** from the drop-down menu.
- Enter an **Address Label** to help identify the new address type.
- Enter valid and verifiable **Address Line 1, Zip code, City, State,** and any additional **Phone** number(s).



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Required fields will have a * asterisk.
Tip: Select Address Type O- Other from the drop-down menu. This prevents the new address from being overwritten.

Enter an Address Label to help identify the new address type. For example, “secondary address“

Enter valid and verifiable in Address Line 1, Zip code, City, State, and any additional Phone number(s).

Please note that the number next to the word “Addresses” has changed from (1) to (2). This client now has two address pages on file.

Adding New Valid and Verifiable Address

To complete, click **Save & Close**.

Click Save & Close to complete the change.

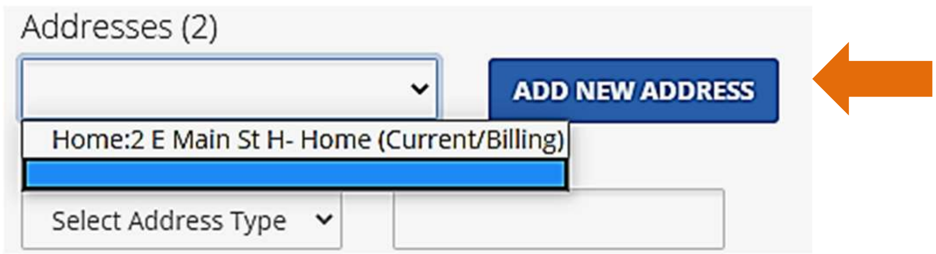
Adding Valid and Verifiable Phone Number

Now we will review adding a valid and verifiable phone number to the Sandata EVV Portal client profile.

Adding Valid and Verifiable Phone Number

To add a valid and verifiable phone number:

Click **Add New Address**.

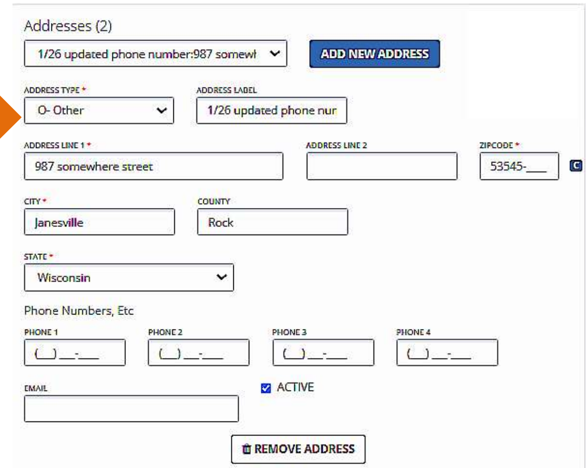


To add an additional or updated valid and verifiable phone number, the provider must use the “Add New Address” function. Think of “address” like an address book or phone book listing—it has the client’s street address as well as phone information.

Click Add New Address.

Adding Valid and Verifiable Phone Number

- Select Address Type **O- Other** from the drop-down menu.
- Enter **Address Label.**
- The address fields are required.



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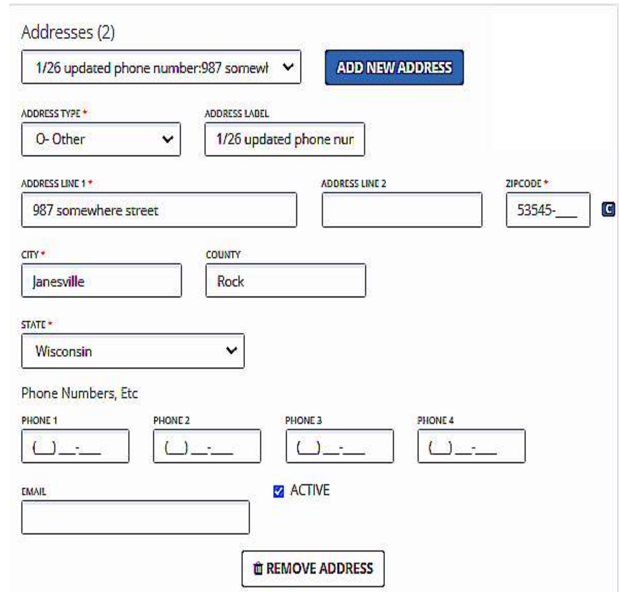
Select Address Type O-Other from the drop-down menu. Do not select the current address line from the drop-down menu.

Enter an optional Address Label that will help remind you why it was added (for example, 1/26 updated phone number*).*

In order for the system to accept your changes for a phone number, the user must fill in an address, even if it is the same as address #1. *An address must be manually entered in the address area for your phone number changes* to save.

Adding Valid and Verifiable Phone Number

- Add the valid and verifiable phone number or other additional information.
- Click **Save & Close.**



For TVV the number must be the client's valid and verifiable phone number. "Valid and verifiable" means landline or fixed Voice over Internet Protocol (VoIP) phone.

An email address can also be added. If the provider has a business need to add this information to their Sandata Portal, this is optional information.

Then click Save & Close.

For a short video demonstration, see "How to Modify Client Address and Phone Number", on the EVV training page.

Change Client Status

Next we will review how to change a client status.

Change Client Status

- Search for client.
- Click **Edit** icon next to the desired client name.

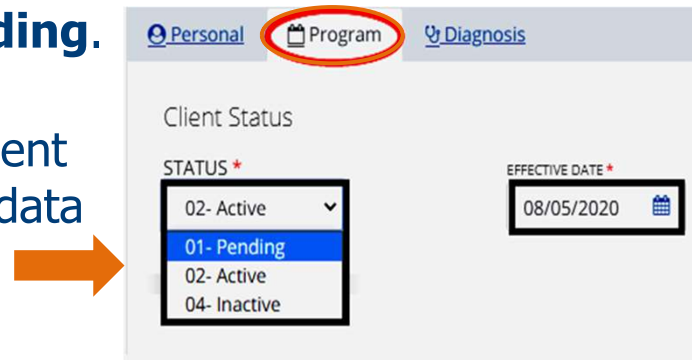
Showing 1-2 of 2 entries

Name	Program	Status	Supervisor	Medicaid ID	Client Payer ID	As Of	SOC	EOC	Services
Test, Member	Fee For Service	Pending		1234567890		1/20/21			T1019
Test, Member two	Fee For Service	Pending		0987654321		1/20/21			T1019

Search for the client you need to modify and click the edit pencil icon next to desired client name.
When you search for a client, the header shows the client *s*tatus. All new clients loading from DHS to Sandata will default to “pending” status.
Clients in a pending status does not affect the ability for an employee to record an EVV visit. However, it does affect the ability to change a Start of Care date for the client, which we’ll take a look at in a few slides.

Change Client Status: Active

- Navigate to the **Program** tab.
- Default status is **01- Pending**.
- The **Effective Date** field defaults to the date the client record was created in Sandata EVV Portal.



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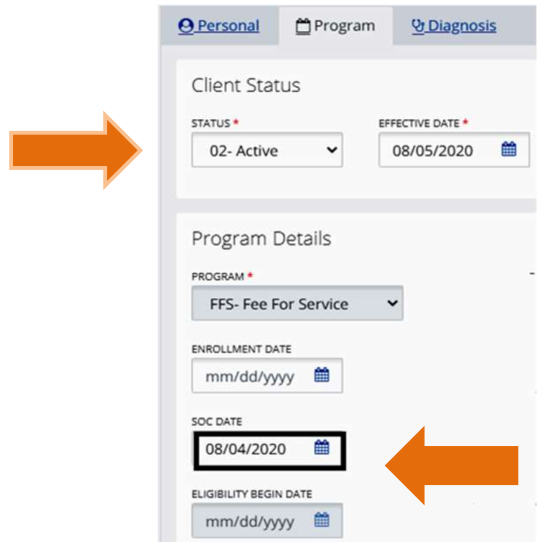
Once providers have chosen the client to edit:
Navigate to the client Program tab and click on the drop-down arrow in the Status field. Providers may choose to leave client in a pending status, as it doesn't affect the ability to log EVV, or change a status to Active or Inactive.

Again: All new clients loaded to Sandata will have the default status of "pending." It may be to the provider's advantage to change all new clients to active, to easily identify newly uploaded clients with new authorizations. The effective date and start of care date is auto-populated as the date the client is added to the Sandata EVV Portal.

Change Client Status: Active

- Set the client's status to **02- Active**.
- Change Start of Care (SOC) date, if visits occurred prior to the Effective Date.
- Click **Save & Close.**



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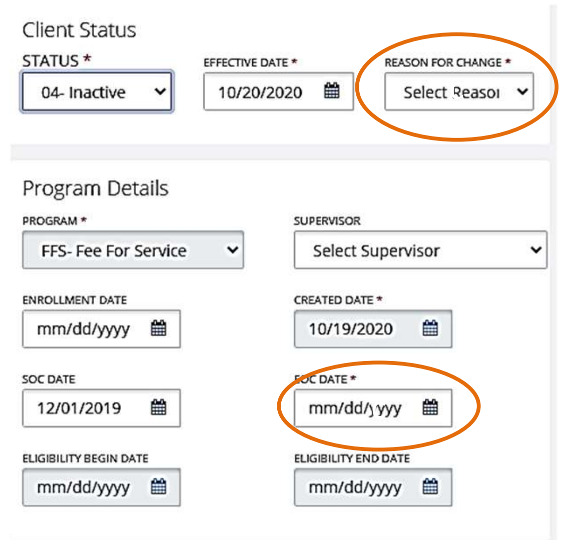
Providers may need to change the start of care date to match first EVV visit date, when the authorization allows. This is only needed if the first visit occurred before the client was loaded to Sandata.

To change the start of care date, the status must be Active. Then tab down to the SOC DATE field and enter the date care stated, as allowed by the authorization. The start of care date field can be prior to the effective date field.

Be sure to save the changes.

Change Client Status: Inactive

- Clients cannot be deleted from the Sandata EVV Portal, only inactivated.
- Using status **04- Inactive** is optional.
- The End of Care (EOC) Date is the date client status becomes inactive.



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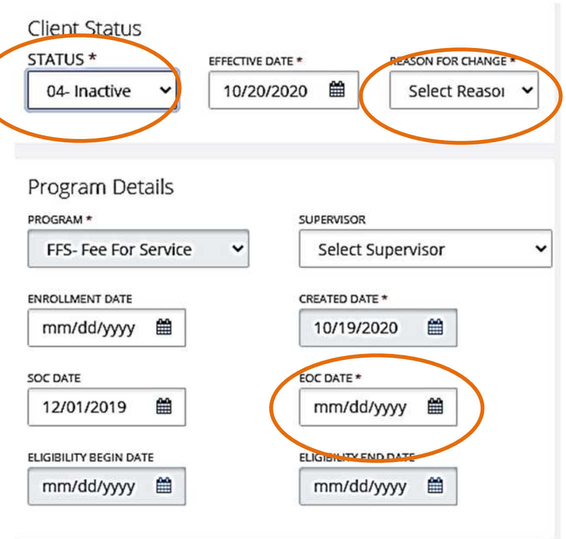
Clients cannot be deleted from the Sandata Portal. Instead their status can be changed to Inactive. When a provider no longer provides care for a client they can change the client status to Inactive. This is optional. This gives the provider the ability to sort or filter for only active clients. We're highlighting here the End of Care (EOC) Date that will need to be filled out. This is the date the client's status becomes inactive. Let's take a look at the steps on the next slide.

Change Client Status: Inactive

- Set the client's status to **04-Inactive**.
- Select **Reason for Change** from drop down menu.
- Enter the client's end date in the **EOC Date** field.
- Click **Save & Close.**



Change the status to "04-Inactive", enter the client's end date in the end of care (EOC Date) field and select a "Reason for Change" from the dropdown menu. When changing a client's status to Inactive, the EOC date and Reason for Change are required.

Change Client Status: Inactive

- Changing client status does not replace current end-dating authorization processes outside Sandata.
- Fee for service providers are still required to amend authorizations' end dates through the ForwardHealth Portal, especially if another provider is taking over care.

This gives the provider the ability to sort or filter for only active clients.

However, keep in mind this does not change any current processes for ending a authorization, such as for Fee for service providers: if you are no longer providing care you are still required to amend your authorization to end date through the ForwardHealth Portal, especially if another provider is taking over care.

Remember, the information entered about clients in Sandata does not flow backwards to DHS or any other entities. It only stays in Sandata.

Resources

Know that we are here to help and providers have many resources available.

Resources

- EVV Customer Care
  - Phone: 833-931-2035, Monday–Friday, 7 a.m.–6 p.m. CT
  - Email: VDXC.ContactEVV@wisconsin.gov
- EVV **Training Administrators** webpage
  www.dhs.wisconsin.gov/evv/training-administrators.htm

Our customer service team are specially trained for EVV and only take EVV calls.

Our EVV Customer Care can be reached at 833-931-2035, Monday–Friday, 7 a.m.–6 p.m. or by sending an email to VDXC.ContactEVV@wisconsin.gov

Thank You

Thank you for the important services you provide to members.

WISCONSIN DEPARTMENT of HEALTH SERVICES

This concludes the training. Thank you for the work you do for Wisconsin Medicaid clients and participants.