

Electronic Visit Verification: Visit Maintenance

November 2023
Wisconsin EVV



P-02754 (12/2023)

Welcome to EVV's Visit Maintenance training.

Objectives

- Understand how electronic visit verification (EVV) data is sent to payers.
- Use the Sandata EVV Portal dashboard to monitor the current day's visit exceptions.
- Search, review, and resolve visit exceptions.
- Prevent visit exceptions.

We've a full list for today. It's important information for administrators:

- Understand how electronic visit verification (EVV) data is sent to payers.
- Use the Sandata EVV Portal dashboard to monitor the current day's visit exceptions.
- Search, review, and prevent visit exceptions.
- Resolve visit exceptions.

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Key Terminology

- Call – A check in or out of a visit through any EVV technology.
- Client – A person who receives services through the Medicaid program
- Dashboard – Real-time status of the current day's visit exceptions
- Employee – A person who provides care to one or more clients

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First, let's start by talking about common terms.

- Call—A check in or out of a visit through any EVV technology. This could be done through the app, telephonic visit verification, fixed visit verification, or even a manual entry in the Sandata EVV Portal.
- Client—A person who receives services through the Medicaid program
- Dashboard—Real-time status of the current day's visit exceptions
- Employee—A person who provides care to one or more clients. It's important to remember that in the Sandata EVV Portal, "employee" does not include administrative or office staff.

A "client" in the Sandata EVV system is frequently called a "member" or "participant" in Wisconsin's service delivery.

Key Terminology

- Exception – Missing information or errors in the Sandata EVV Portal
- FVV – Fixed visit verification
- Santrax ID – The ID number employees receive from Sandata to identify them in TVV and FVV
- SMC – Sandata Mobile Connect app
- TVV – Telephonic visit verification
- Visit – An in-person service to a client in a home or community-based setting

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- Exception —Missing information or errors in the Sandata EVV Portal
- FVV—Fixed visit verification
- Santrax ID—The ID number employees receive from Sandata to identify them in TVV and FVV
- SMC—Sandata Mobile Connect app
- TVV—Telephonic visit verification
- Visit—An in-person service to a client in a home or community-based setting

EVV Visit Lifecycle

Let's start with understanding how a visit goes through the Sandata system—and what would prevent it.

EVV Visit Lifecycle



How does EVV information successfully travel from the visit to the payer? Understanding this path will help you understand challenges along the way. The flyer linked here is worth referring to as your understanding of EVV matures. The QR code will take you to it: Open your cell phone camera and hover it over the QR box. A text box will pop up. Tap on the text box and it will take you to the flyer.

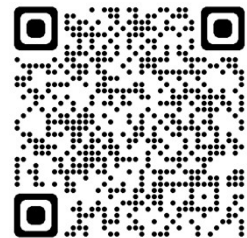
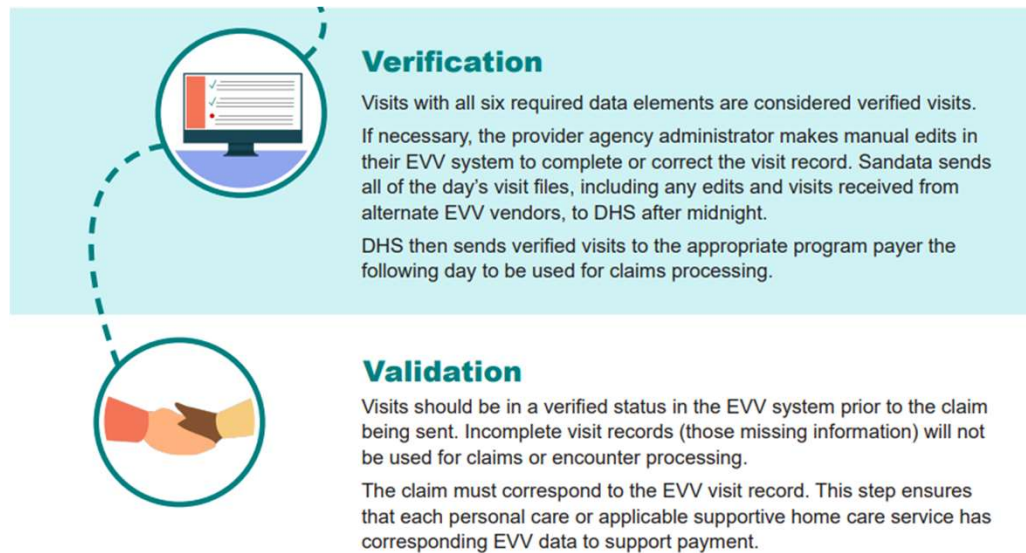
The first step is having an authorization on file. DHS sends all authorizations for services requiring EVV to Sandata each night. The authorization sets up a foundation for the rest of the steps. It confirms the correct services are provided to the correct client, by the correct provider agency (and their employee), within the timeframe outlined.

A side note: In Wisconsin, certain services are allowed by policy without an authorization. In these situations, the required authorization information can be created by the provider (remember, this includes independent nurses) in the Sandata EVV Portal. Again, the purpose is to establish that foundation.

Next is the visit. Employees use EVV technology to check in and check out of a visit. The information gathered should reflect to the authorization: the correct services, provided to the correct client, by the correct provider (and their employee), within the timeframe outlined.

Invest in training employees! An employee who knows how to use EVV during the visit is an important part of this path and their success will make the rest much easier. Let's go to the next slide.

EVV Visit Lifecycle



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The visit information automatically flows into the Sandata EVV Portal, where an administrator views it. If there is missing or inaccurate authorization information, this will need attention. If the employee entered the wrong information or the visit is missing information, this will need correcting. This administrative work is called verification and is the step you see on the top of the slide.

Most of the remainder of this presentation will look at verification--those information gaps and how to close them. Why is it important? Because of the final step.

That last step is validation. Only visits with complete information, those that are verified, are automatically forwarded to the payer. The payer will hold that EVV visit information. When the provider sends a claim (using the usual process, outside EVV), the payer will see if EVV information supports the claim. The payer validates the claim.

What if verification was not done, and the visit's errors or missing information not corrected? The EVV visit would not be sent to the payer, and any claim submitted later cannot be validated. The claim cannot be paid.

Bottom line: By verifying visits, you are helping ensure claims are validated and your

agency gets paid.

EVV Visit Lifecycle

Soft Launch

- Claims are required to have a corresponding EVV record.
- Claims without will have informational error messages.

Hard Launch

- Claims are required to have a corresponding EVV record.
- Claims without will have error message and be denied.

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There is an opportunity for home health care service providers. Soft launch, which begins on January 1, 2024 for home health care services, is when EVV is required but there are **no** financial consequences—no claim denials. If EVV information is missing, payers will provide informational error messages so providers can improve their processes.

After hard launch, EVV remains required. The difference is that claims will be denied if there is no corresponding EVV information. As with other kinds of claim denials, providers will have an opportunity to correct the information, and then resubmit their claim for payment.

Providers who practice capturing EVV information in soft launch have fewer claim denials when hard launch begins. Take advantage of this opportunity: practice, practice, practice!

Providers, including independent nurses, and employees should use the soft launch phase to become more efficient with EVV, streamline processes, take additional training as needed, and use an EVV system to capture required services. Work through any challenges **before** consequences take place during the hard launch

phase.

EVV Visit Lifecycle

For providers, EVV does not change:

- The process of how claims are submitted.
- Documentation retention requirements.
- The need for physician orders, a plan of care, or other required documentation.
- Timely filing requirements with payers.

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A few reminders; for providers, EVV does not change:

- EVV does not change the process of how claims are submitted. Claims are done the same as usual, outside EVV.
- EVV does not change documentation retention requirements.
- EVV does not change the need for physician orders, a plan of care, or other required documentation.
- EVV does not change timely filing requirements with payers. Although the Sandata EVV Portal allows edits to visit data 365 days from the date of service, a payers' requirements for timely claims may be less time. Be sure you understand your payers' requirements.

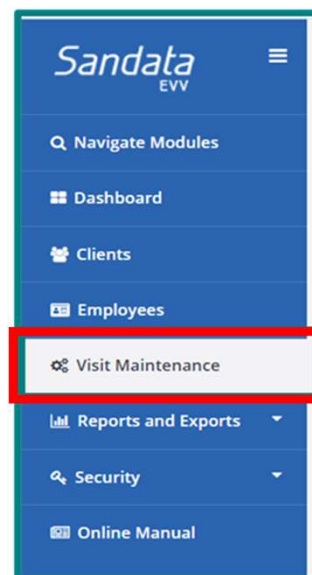
Sandata EVV Portal Visit Maintenance

We'll take some time here to get acquainted with what you'll see in the Visit Maintenance module. This is where you'll do the work of visit verification.

Sandata EVV Portal Visit Maintenance

Visit Maintenance is the Sandata EVV Portal module where visits are:

- Viewed in near real-time.
- Verified that all required data elements have been captured.
- Corrected and cleared of exceptions (errors).
- Confirmed to be in a “verified” status prior to submitting claims.



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Visit Maintenance is the Sandata EVV Portal module where visits are:

- Viewed in near real-time.
- Verified that all required data elements have been captured.
- Corrected and cleared of exceptions (errors).
- Confirmed to be in a “verified” status prior to submitting claims outside EVV.

This is where you’ll do the work of visit verification.

Sandata EVV Portal Visit Maintenance

- It is important to verify visits in a timely manner so the visit is automatically sent to DHS and payers for claims/encounter processing.
- More than one exception can apply to a single visit.
- Fixing one issue within visit maintenance may also fix several other exceptions.
- A provider administrator with visit maintenance security privileges can correct and add data.

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Here are some basic ideas to start:

Verify visits in a timely manner, so you can submit claims in a timely manner. Get visits verified before the claim is sent.

A visit can have several exceptions. Sometimes they are related and can be easily fixed.

The system defined roles that can edit visits in visit maintenance are:

System Admin

Coordinator

See the security training for more information about assigning roles and privileges.

Visit Maintenance

On the navigation panel, click Visit Maintenance to search for visits.

The screenshot shows the Sandata EVV Visit Maintenance interface. On the left, a navigation panel lists various modules: 'Navigate Modules', 'Dashboard', 'Clients', 'Employees', 'Visit Maintenance' (highlighted with a red box), 'Reports and Exports', 'Security', and 'Online Manual'. The main content area is titled 'Visit Maintenance / Manage Visits'. It features a 'Select a Visit' section with a 'CREATE CALL' button. Below this, there are several filter fields: 'DATE RANGE MM/DD/YYYY' (07/07/2020 to 07/07/2020), 'CLIENT' (Enter Client), 'EMPLOYEE' (Enter Employee), 'CATEGORY' (Select Category), 'PAYER' (Select Payer), 'VISIT STATUS' (Select Visit Status), and 'CLIENT MEDICAID ID' (Enter Client Medic). There is also a 'FILTER VISITS BY' dropdown set to 'All Exceptions' and a 'Show advanced filter options' link. At the bottom, there are 'SEARCH' and 'CLEAR' buttons.

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On the navigation panel, click Visit Maintenance to search for visits.

As we've recommended before, we invite you to use your mouse and move it to the Visit Maintenance module. Connect your muscle memory to your brain.

Visit Maintenance

- Use the drop-down menus in each field to filter the visit search.
- The search results include all data that matches the specified parameters.

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From here, you'll have the opportunity to search for as many or as few visits as you'd like, back to the beginning of your Sandata EVV Portal account. There are several search fields that can help you narrow down the search results.

Use the drop-down menus in each field to filter the visit search. Fill in the fields desired – by date range, client name, employee name, or other information. You can keep some fields blank.

You can enter portions of a name if you are not sure of a spelling (for example, "Kell" if you are not sure if it's Kelly or Kelley).

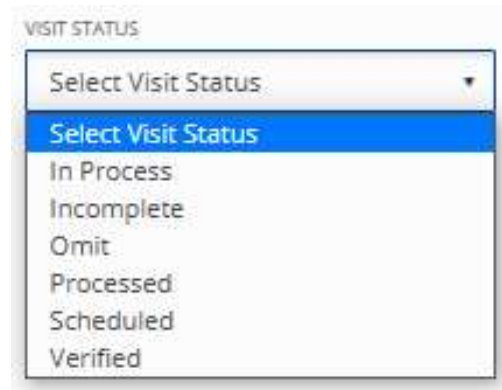
There are also advanced filter options on the lower right.

Take a look at the bottom right field, "Visit Status." We'll talk about this field next.

Search Filters

The Visit Status parameter allows a user to filter visits by their status:

- **In Process**—Visits that have started and not yet completed
- **Incomplete**—Visits missing key information, for example, check in or check out



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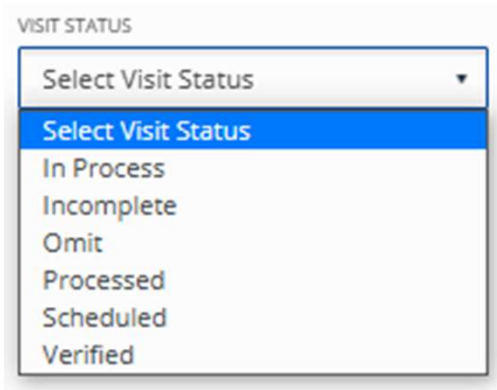
You can search for visits based on their “Visit Status.” You can select from these choices:

“In process” is when a visit check-in is captured and there has been no check out yet. The employee may still be with the client, in process of the visit. You may want to see if a check-in went well.

“Incomplete” can occur for many reasons. The visit could be missing check in or check out, or have missing or incorrect client information, or have an incorrect employee Santrax number. These are the visits that will require your attention.

Search Filters

- **Omit** —Visit record to be ignored
- **Verified**—Visits that do not contain any exceptions



A screenshot of a web application's 'VISIT STATUS' dropdown menu. The menu is open, showing a list of options. The first option is 'Select Visit Status' with a downward arrow. Below it, the same text 'Select Visit Status' is repeated. The remaining options are 'In Process', 'Incomplete', 'Omit', 'Processed', 'Scheduled', and 'Verified'. The 'Omit' option is highlighted in blue.

| VISIT STATUS |
|-----------------------|
| Select Visit Status ▼ |
| Select Visit Status |
| In Process |
| Incomplete |
| Omit |
| Processed |
| Scheduled |
| Verified |

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“Omit” status is rather unique. Visits cannot be deleted from the Sandata EVV Portal. Instead, providers can assign the Omit status when a visit is captured in error. Omit status can help filter out these records so that the administrators aren’t looking to edit these accidental visit records.

“Verified” will show all the visits that have all the data and require no further action.

“Processed” and “Scheduled” are not used for Wisconsin.

Search Filters

Use the **Filter Visits By** field to choose to filter visits by:

- All Exceptions
- Exception Types
- All Visits



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Another filter choice is the “Filter Visits By” field.

Important tip: Always check to make sure this field shows what you want. By default, this filter is set to “All Exceptions.” Filtering instead for “All Visits” is the only way to see visits that are in a verified status.

Let’s go through the results when each of these is chosen.

Search Filters

Filter Visits by All Visits

- All visits are displayed within the date parameters selected.
- Status results include verified, in process, omit, and incomplete.

The screenshot shows a web application interface for searching visits. At the top, there are input fields for 'DATE RANGE' (MM/DD/YYYY) with '08/10/2020' selected, and 'CLIENT' and 'EMPLOYEE' dropdowns. Below these are 'CATEGORY' and 'PAYER' dropdowns, and 'VISIT STATUS' and 'CLIENT MEDICAID ID' dropdowns. A 'FILTER VISITS BY' dropdown is set to 'All Visits'. There are 'SEARCH' and 'CLEAR' buttons, and an 'EXPORT' button. Below the filters, there is a 'ROWS PER PAGE' dropdown set to '50' and a 'Show Display Options' link. The main part of the interface is a table with columns: Client Name, Employee Name, Service, Visit Date, Call In, Call Out, Call Hours, Adjusted In, Adjusted Out, Adjusted Hours, Visit Status, Not Bill, Approved, and Actions. The table contains three rows of data for visits on 08/10/2020.

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out | Call Hours | Adjusted In | Adjusted Out | Adjusted Hours | Visit Status | Not Bill | Approved | Actions |
|----------------|---------------|-------------------------|------------|----------|----------|------------|-------------|--------------|----------------|--------------|--------------------------|--------------------------|---------|
| BELL, BEATRICE | Lang, Beth | COMBO - PCS & SHC | 08/10/2020 | 06:14 AM | 06:47 AM | 00:33 | 06:14 AM | 06:47 AM | | Verified | <input type="checkbox"/> | <input type="checkbox"/> | |
| CLEMENTE, DANA | Lang, Beth | Personal Care Svc/15min | 08/10/2020 | 06:14 AM | 06:46 AM | 00:32 | 06:14 AM | 06:46 AM | | Verified | <input type="checkbox"/> | <input type="checkbox"/> | |
| GREY, JEAN | | | 08/10/2020 | 06:05 AM | | | 06:05 AM | | | Incomplete | <input type="checkbox"/> | <input type="checkbox"/> | |

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If you filter visits by All Visits:

- All visits are displayed within the date parameters selected.
- Status results include verified, in process, omit, and incomplete. You'll see visits that are successful and ones that need attention.

Search Filters

Filter Visits by All Exceptions

- Visits are displayed containing one or more exceptions within the specified time period.
- This is the system default setting.

The screenshot shows the 'Manage Visits' search interface. At the top, there's a breadcrumb 'Visit Maintenance / Manage Visits' and a user account '91027 - vicky.murphy@DXC.com'. A 'LOG OUT' link is in the top right. Below the breadcrumb is a 'Select a Visit' section with a 'CREATE CALL' button. The main search area contains several filters: 'DATE RANGE MM/DD/YYYY' with a date picker set to '07/30/2020'; 'CATEGORY' with a dropdown 'Select Category'; 'PAYER' with a dropdown 'Select Payer'; 'CLIENT' with a text input 'Enter Client'; 'EMPLOYEE' with a text input 'Enter Employee'; 'VISIT STATUS' with a dropdown 'Select Visit Status'; and 'CLIENT MEDICAID ID' with a text input 'Enter Client Medica'. A red box highlights the 'FILTER VISITS BY' dropdown, which is currently set to 'All Exceptions'. A 'Show advanced filter options' link is at the bottom right. At the bottom left are 'SEARCH' and 'CLEAR' buttons.

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If you filter visits by All Exceptions

- Visits are displayed containing one or more exception (errors) within the specified time period.

This is the system default setting—your search will only show exceptions unless you change this field.

Search Filters

Filter Visits by Exception Types

- When selected, an additional field appears prompting the user to choose the specific exception type(s) from a drop-down menu.

The screenshot displays a web interface for filtering visits. On the left, under the heading 'FILTER VISITS BY', there is a dropdown menu currently showing 'Exception Types'. Below this menu are two buttons: a blue 'SEARCH' button with a magnifying glass icon and a white 'CLEAR' button. To the right of the filter section is the 'EXCEPTION TYPES' area. It features a dropdown menu labeled 'Select Exception Type' and a list of four exception types, each with an unchecked checkbox: 'CLIENT SIGNATURE EXCEPTION', 'GPS DISTANCE EXCEPTION', 'MISSING SERVICE', and 'SERVICE VERIFICATION EXCEPTION'. A vertical scrollbar is visible on the right side of the exception types list.

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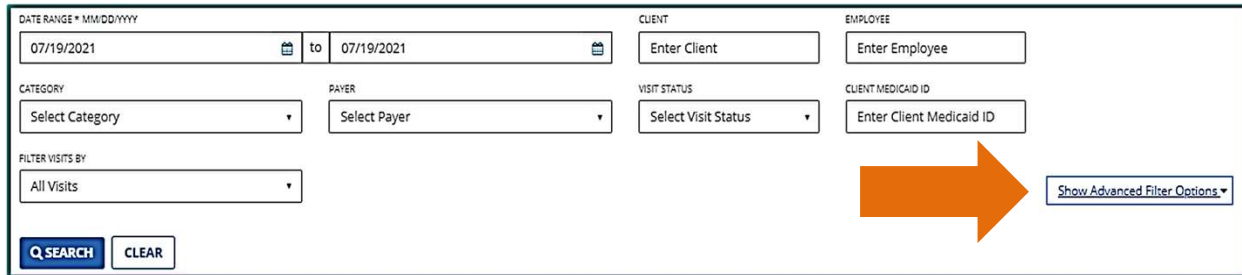
What if you filter visits by Exception Types?

- When selected, an additional field appears prompting the user to choose the specific exception type(s) from a drop-down menu.

This is a great tool to work all the same type of exceptions at the same time.

Search Filters

To change default filters, click **Show Advanced Filter Options**.



The screenshot displays a search filter interface with the following components:

- DATE RANGE * MM/DD/YYYY:** Two date pickers showing "07/19/2021" with a "to" separator.
- CLIENT:** A text input field labeled "Enter Client".
- EMPLOYEE:** A text input field labeled "Enter Employee".
- CATEGORY:** A dropdown menu labeled "Select Category".
- PAYER:** A dropdown menu labeled "Select Payer".
- VISIT STATUS:** A dropdown menu labeled "Select Visit Status".
- CLIENT MEDICAID ID:** A text input field labeled "Enter Client Medicaid ID".
- FILTER VISITS BY:** A dropdown menu currently set to "All Visits".
- Buttons:** A blue "Q SEARCH" button and a white "CLEAR" button.
- Action:** A button labeled "Show Advanced Filter Options" with a downward arrow, highlighted by a large orange arrow pointing towards it from the left.

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Once you find a search filter that works best for you, you can change this to be your default filter settings. To change default filters, click Show Advanced Filter Options.

Search Filters

Changing Default Filters

- Select any filter with a drop-down menu to change the default setting.
- Click **Save Settings** to save the changes as the new default setting.

The screenshot displays a search filter interface with the following components:

- DATE RANGE:** A date range selector showing "07/19/2021" to "07/19/2021".
- CATEGORY:** A drop-down menu labeled "Select Category".
- PAYER:** A drop-down menu labeled "Select Payer".
- VISIT STATUS:** A drop-down menu labeled "Select Visit Status".
- CLIENT:** A text input field labeled "Enter Client".
- EMPLOYEE:** A text input field labeled "Enter Employee".
- CLIENT MEDICAID ID:** A text input field labeled "Enter Client Medicaid ID".
- FILTER VISITS BY:** A drop-down menu labeled "All Visits".
- CALL TYPE:** A drop-down menu labeled "Select Call Type".
- SUPERVISOR:** A drop-down menu labeled "Select Supervisor".
- DEPARTMENT:** A drop-down menu labeled "Select Department".
- PROGRAM:** A drop-down menu labeled "Select Program".
- SERVICE:** A drop-down menu labeled "Select Service".
- GROUP VISIT CODE:** A drop-down menu labeled "Select Group Visit Code".
- Buttons:** "SAVE SETTINGS", "RESET", "SEARCH", and "CLEAR".
- Advanced Filter Options:** A link labeled "Hide Advanced Filter Options" with a right-pointing arrow.








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- Select any filter with a drop-down menu to change the default setting.
- Click Save Settings to save the changes as the new default setting.

Be aware: After Sandata performs regular maintenance and updates on the Sandata EVV Portal, any changes made to the default filters will need to be reset.

Identifying Exceptions

Visit exceptions are indicated by a colored dot.

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out | Call Hours | Adjusted In | Adjusted Out | Adjusted Hours | Visit Status | Do I |
|--|-----------------------|---|------------|---|---|------------|-------------|--------------|----------------|--------------|------|
|  | TestEmpThree, Sandata | Supportive Home Care/Day  | 07/07/2020 | 11:29 AM |  | | 11:29 AM | | | In Process | |
| MRBTwo, Test | TestEmpNine, Sandata | Supportive Home Care/15min | 07/07/2020 | 10:14 AM |  | | 10:14 AM | | | In Process | |
| TestMbrEight, Sandata  | TestEmpNine, Sandata | Supportive Home Care/15min  | 07/07/2020 |  | 09:23 AM | | | 09:23 AM | | Incomplete | |

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When you're done filtering, you may see a list of visits like this. Each row is a different visit. You can see the information that is summarized across each row.

Visit exceptions are indicated by a colored dot. It will appear in the column where the exception exists. A visit may have one or more exceptions. In our top row example, there are three exceptions:

Client name









Service

Missing call out

Note: Red dots indicate exceptions that need to be fixed. Orange dots denote exceptions that need to be acknowledged. Yellow dots are informational only and don't need to be fixed or acknowledged.

Identifying Exceptions

Hovering over a dot displays a pop-up with a description of the exception(s).

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out | Call Hours | Adjusted In | Adjusted Out | Adjusted Hours |
|---|----------------|---|------------|---|----------|------------|-------------|--------------|----------------|
|  | Young, Charles |  | 08/14/2017 |  | 2:47 PM | | | | |
|  | Young, Charles |  | 08/14/2017 |  | 2:46 PM | | | | |
|  | 000-44-6258 |  | 08/14/2017 | | | | | | |

Exceptions:
Visits without in-calls

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When you hover your cursor over the exception, a message will describe it.

Identifying Exceptions

Visit exceptions must be fixed or acknowledged:

- **Fix**—The information must be corrected or added for the visit to be considered complete.
- **Acknowledge**—The missing information must be acknowledged to be considered complete.

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When an exception occurs, a provider administrator will need to do one of these actions:

Fix means to add missing data or change incorrect data.

In some cases, the administrator must “acknowledge” that the exception occurred, as the missing or incorrect information can only be collected at the time of the visit.

Either action will correct the error in the visit. Let’s take a look at some examples.

Identifying Exceptions

| Exception Setting | Description | Setting |
|---------------------------|--|-------------|
| Unknown Client | A visit occurs where the client is not known to the Sandata system. | Fix |
| Unknown Employee | The employee Santrax ID entered during a TVV or FVV call does not match to any known employee. | Fix |
| Unmatched Client Phone/ID | A client ID is entered during a TVV call, but the phone number the call was made from is not a number listed for the client. | Acknowledge |

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Here are the exceptions that may show up in your Sandata EVV portal.

- Unknown Client can occur when the Client ID entered does not match to an existing client. Maybe the client ID was entered wrong. It can also happen when the app is offline and the employee didn't fill in the client name or ID on the app screen. This can be fixed by entering in the client's name.
- Unknown employee may happen if an employee types their ID in wrong. This can be fixed by entering in the employee.
- Unmatched Client Phone/ID can occur when the phone number used to call in a TVV visit does not match to a known client. This can be acknowledged—there's no way to go back in time to "fix" what phone number was used. Acknowledging it will remove the exception and be considered corrected.

Identifying Exceptions

| Exception Setting | Description | Setting |
|--------------------------|---|---------|
| Missing Service | The service provided for the visit is not specified. | Fix |
| Visits Without In-Calls | The visit does not have a call in. Check for visit to merge. | Fix |
| Visits Without Out-Calls | The visit does not have a call out. Check for visit to merge. | Fix |

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Missing service can happen if a service code wasn't entered at the time of the visit. The service code can be entered.

Missing in or out calls can sometimes be fixed with entering the in or out call, and sometimes by merging calls. Merging visits will be talked about in more detail later.

Identifying Exceptions

| Exception Setting | Description | Setting |
|----------------------|--|---------|
| Unauthorized Service | The service entered during the check in or check out does not match the service approved on the authorization. | Fix |

Tip: GPS exceptions are informational only and do not need to be corrected.

Unauthorized service happens when the service entered doesn't match the authorization.

Tip: Please note GPS location will be flagged only as an informational exception if it is not near a known address for the client. This is not an exception that will prevent a visit from being verified. For this reason, GPS exception is listed apart from the chart above and won't show as a dot in Visit Maintenance lists.

Reason Codes

- Reason codes appear when making any visit changes in the Sandata EVV Portal.
- Documentation should support the need for the change. This may be documentation the provider currently has on file.



A screenshot of a web form from the Sandata EVV Portal. The form contains three main sections: 'REASON CODE *', 'RESOLUTION CODE *', and 'REASON NOTE'. The 'REASON CODE *' and 'RESOLUTION CODE *' fields are highlighted with an orange border. Each of these fields is a drop-down menu with a small downward arrow icon. The 'REASON NOTE' field is a text area with the placeholder text 'Reason Note'.

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The Reason Code field will show whenever you make visit changes in the Sandata EVV Portal. There is a drop-down menu to choose from that we'll review in just a bit. There's also a Reason Note field that is available, but in this case not required (it doesn't have an asterisk next to it).

The Resolution Code is a drop-down menu as well, with "Written documentation" as the only option. The Centers for Medicare & Medicaid Services (CMS) requires documentation for all changes to a visit. However, CMS has not defined the documentation requirements. Providers must maintain documentation that is evidence of why the changes are made. This could be the medical records, timesheets, or prior authorizations (wherever the providers maintain the evidence for what they are billing).

For example, if a visit was logged from 2-4 p.m. and a manual change was done to make it Noon-4 p.m., documentation would be required to show the visit was indeed four hours.

Please be aware: Visits that are modified may be subject to additional DHS scrutiny as weren't fully electronically captured at the time of service.

Reason Codes

| Reason Code | Reason Note Required within the Sandata EVV Portal |
|-----------------------------|--|
| Caregiver Error | No |
| client Unavailable | No |
| Mobile Device Issue | No |
| Telephony Issue | No |
| client Refused Verification | Yes |
| Service Outside the Home | No |
| Missing in System | No |
| Other | Yes |

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The table here shows the list of drop-down reason codes.

As you see here, most don't require any extra notes within the Sandata EVV Portal. When a note is required, that field will be available to type it in. This becomes part of your documentation, in addition to items outside EVV.

Basic Steps: Exceptions

Select the exception dot.

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out |
|---------------|----------------------|---------|------------|----------|----------|
| (555)555-1307 | Employee Employee | ● | 10/27/2017 | 05:32 PM | ● |

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Whether you are “fixing” or “acknowledging,” and no matter what your reason for needing to make a correction, here’s the general way you will take care of all exceptions: SELECT and CORRECT.

From the list of visits in Visit Maintenance, SELECT an exception dot by clicking on it.

Basic Steps: Exceptions

Enter the corrections.

The screenshot shows a web application interface for finding a client. On the left is a sidebar with buttons: CLIENT, EMPLOYEE, CALL LOG, MERGE CALLS, EXCEPTIONS, GPS, MEMO, CLAIMS, and HISTORY. The main area is titled 'Find Client' and contains a search form with fields for LAST NAME, FIRST NAME (with placeholder 'Enter First Name'), CLIENT ID # (with placeholder 'Enter Client ID #'), and CLIENT MEDICAID ID (with placeholder 'Enter Client Medicaid ID'). There is also a checkbox for 'INCLUDE INACTIVE CLIENTS'. A search button with a magnifying glass icon is on the right. Below the search form is a table with columns: Actions, Last Name, First Name, Client ID #, Primary Phone #, and Client Medicaid ID. The first row of the table has a blue circle icon in the Actions column and the value '996093' in the Client ID # column. Below the table is a pagination bar showing 'Showing 1 to 1 of 1 entries' and navigation buttons. At the bottom, there are fields for 'REASON CODE *' and 'RESOLUTION CODE *', a 'REASON NOTE' field with a placeholder 'Reason Note', and a 'SAVE' button. Red boxes highlight the search form, the first row of the table, and the reason/resolution code fields.

| Actions | Last Name | First Name | Client ID # | Primary Phone # | Client Medicaid ID |
|---------|-----------|------------|-------------|-----------------|--------------------|
| | | | 996093 | | |

Showing 1 to 1 of 1 entries

« < 1 > »

REASON CODE * RESOLUTION CODE * REASON NOTE
Reason Note

SAVE

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A new screen will open with the full details of the visit and bring you to the area of concern.

CORRECT: Enter in the corrections.

Basic Steps: Exceptions

Enter the corrections identified and **Save.**

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

Find Client

LAST NAME

FIRST NAME

CLIENT ID #

CLIENT MEDICAID ID

Enter Client Medicaid ID

INCLUDE INACTIVE CLIENTS

| Actions | Last Name | First Name | Client ID # | Primary Phone # | Client Medicaid ID |
|---------|-----------|------------|-------------|-----------------|--------------------|
| | | | 996093 | | |

Showing 1 to 1 of 1 entries

REASON CODE *

RESOLUTION CODE *

REASON NOTE

Reason Note

SAVE

Finally, enter in the required fields at the bottom, Reason Code and Resolution Code.

Save.

We'll see these steps over and over in the slides to come. Once you know the pattern you can get a rhythm going.

Sandata EVV Portal Dashboard

Now that we've gotten acquainted with the basics of visit maintenance, let's take a fresh look at another tool: the dashboard.

Sandata EVV Portal Dashboard

- Unknown Clients and Unknown Employees exceptions can be accessed from the dashboard.
- Click on the number under the exception category to display a view only list of those exceptions.

The screenshot displays the Sandata EVV Portal Dashboard. At the top, there is a header with 'Dashboard' and 'Dashboard' tabs, a search bar labeled 'Enter agency', and a 'LOG OUT' button. Below the header is a 'Filter Options' section. It includes a 'REFRESH EVERY' dropdown set to '5', a 'Minutes (2min - 30max)' label, a 'SUPERVISORS' dropdown set to 'All', and a 'REFRESH NOW' button. The main content area is divided into two columns: 'Unknown Clients' with a count of '1' and 'Unknown Employees' with a count of '0'.

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The Sandata EVV portal dashboard is the first screen that appears when a user logs in. This is a real-time “today only” snapshot. The data on the dashboard will refresh every five minutes but can be set to refresh at a frequency you choose, from two to 30 minutes, or in the moment (using the “Refresh Now” button on the right).

There are two exceptions that are highlighted on the dashboard. These will also appear in visit maintenance lists, of course, but this quick view can help providers quickly identify employees who may be missing key information. You can start to problem solve and prevent future exceptions right away.

- Unknown Client—An employee has entered a visit but could not find the client in the Sandata system.
- Unknown employee—An employee enters the wrong employee Santrax ID into TVV or FVV.

Once you see this screen, what do you do next?

Sandata EVV Portal Dashboard

Clicking the exception *name* allows the user to edit those exceptions.

The screenshot shows the Sandata EVV Portal Dashboard. On the left, under 'Filter Options', the 'Unknown Clients' exception category is highlighted with a red box. An orange arrow points from this box to the 'Manage Visits' screen on the right. The 'Manage Visits' screen displays a table of visits with columns: Client Name, Employee Name, Service, Visit Date, Call In, Call Out, Call Hours, Adjusted In, Adjusted Out, Adjusted Hours, Bill Hours, Visit Status, Do Not Bill, and Actions. The table shows three visits for 'Miss, Donna' on 08/13/2017, all with 'Incomplete' status. The 'Unknown Clients' exception category is also visible in the 'Exception Types' dropdown menu.

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out | Call Hours | Adjusted In | Adjusted Out | Adjusted Hours | Bill Hours | Visit Status | Do Not Bill | Actions |
|-------------------|---------------|---------|------------|----------|----------|------------|-------------|--------------|----------------|------------|--------------|--------------------------|----------------------|
| (714) Miss, Donna | 000-33-6986 | | 08/13/2017 | 11:40 AM | | | | | | | Incomplete | <input type="checkbox"/> | Edit |
| (714) Miss, Donna | 000-33-6986 | | 08/13/2017 | 2:48 PM | | | | | | | Incomplete | <input type="checkbox"/> | Edit |
| (714) Miss, Donna | 001-23-6666 | | 08/13/2017 | 2:13 PM | | | | | | | In Progress | <input type="checkbox"/> | Edit |

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Click the exception category name to open the Manage Visits screen. From there, you can view and edit the visits for that exception.

Let's explore how to edit each of those exception types next.

Correcting Unknown Client Exceptions

First: correcting unknown client exceptions.

Unknown Client Exception

This exception happens when the client is not able to be identified in the system. This can occur when:

- An SMC visit is started as an unknown visit.
- The authorization is not on file with Sandata.
- The employee typed in a wrong client ID.
- The employee checked-in/checked-out from an unrecognized phone number.

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"Unknown client" means the system was unable to confirm the client. The client is "known" to the provider, of course.






Tip: This is a good exception to start with. Sometimes, once the client's name is entered, other exceptions for that visit will automatically clear.

Here are some reasons this exception can occur:

- An employee may start an offline SMC visit as an "Unknown Visit" but did not enter the client's name.
- The authorization may not be on file with Sandata. How can this happen?
 - There are some situations where an authorization is not needed by policy. To get the information loaded to the Sandata system, providers will need to enter it. We'll cover this in the "Entering required authorization information" presentation.
 - Sometimes, care needs to start before the authorization is set up. When the authorization arrives, these exceptions should clear.
 - Sometimes, the payer is delayed in sending the authorization. If an approved authorization is not loaded to Sandata in three days, contact EVV Customer Service. They can help trace the authorization.
- The employee typed in a wrong client ID.
- The employee checked-in/checked-out from an unrecognized phone number.

Unknown Client Exception

Click the exception dot under the Client Name column.

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out |
|--|--|---|------------|----------|---|
| (555)555-1307  |   |  | 10/27/2017 | 05:32 PM |  |

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As usual when making corrections, start by clicking on the red dot—the exception indicator. When you hover over it, it should say, “unknown client.” Select it.

Unknown Client Exception

Use the search fields to search for the client.

The screenshot shows a 'Visit Details' form. At the top, there's a header with 'Visit Start Date: 07/19/2020' and a close button. Below this is a table with columns: CLIENT NAME (920)737-7283, CLIENT ID #, MEDICAID ID #, EMPLOYEE NAME, and EMPLOYEE ID #. A message states 'No Client has been assigned to this visit.' On the left is a sidebar with tabs: GENERAL, CLIENT, EMPLOYEE, CALL LOG, TASKS, EXCEPTIONS, GPS, MEMO, CLAIMS, and HISTORY. The 'CLIENT' tab is selected. The main area contains a 'Find Client' section with input fields for 'Enter Last Name', 'Enter First Name', and 'Enter Client ID #'. An orange arrow points to the 'Enter Client ID #' field. There is also a checkbox for 'INCLUDE INACTIVE CLIENTS' and a 'CANCEL' button at the bottom.

A new screen will open with the full details of the visit and bring you to the area needing correction. In this case, it brings you to the area that allows you to add the client.

First, use the search fields to search for the correct client.

Unknown Client Exception

Click the button next to client name.

Visit Details

Visit Start Date: 07/19/2020

CLIENT NAME

(920)737-7283

CLIENT ID #

MEDICAID ID #

EMPLOYEE NAME

EMPLOYEE ID #

GENERAL

CLIENT

EMPLOYEE

CALL LOG

TASKS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

No Client has been assigned to this visit.

Find Client

LAST NAME

test

FIRST NAME

Enter First Name

CLIENT ID #

Enter Client ID #

CLIENT MEDICAID ID

Enter Client Medicaid ID

☐ INCLUDE INACTIVE CLIENTS

Actions

Last Name

First Name

Client ID #

Primary Phone #

Client Medicaid ID

☐

TestMbrEight

Sandata

292674

5551112233

2222333311

☐

TestMbrEighteen

Sandata

434708

5551112233

1111444556

☐

TestMbrEleven

Sandata

767962

5551112233

9999444488

☐

TestMbrFifteen

Sandata

266348

5551112233

☐

TestMbrFifteen

Sandata

927589

5551112233

1111444488

Showing 1 to 5 of 17 entries

<

<

1

2

3

4

>

>

Select the correct client by clicking the button next to their name.

Unknown Client Exception

- Select a reason code from the list.
- Select the resolution code, Written Documentation Maintained.
- Click **Save**.

The screenshot shows a web application interface for finding a client. On the left is a sidebar with buttons: CLIENT, EMPLOYEE, CALL LOG, MERGE CALLS, EXCEPTIONS, GPS, MEMO, CLAIMS, and HISTORY. The main area is titled 'Find Client' and contains several input fields: LAST NAME, FIRST NAME (with placeholder 'Enter First Name'), CLIENT ID # (with placeholder 'Enter Client ID #'), and CLIENT MEDICAID ID (with placeholder 'Enter Client Medicaid ID'). There is also a checkbox for 'INCLUDE INACTIVE CLIENTS'. Below these fields is a table with columns: Actions, Last Name, First Name, Client ID #, Primary Phone #, and Client Medicaid ID. The table shows one entry with Client ID # 996093. Below the table is a pagination bar showing 'Showing 1 to 1 of 1 entries' and navigation buttons. At the bottom, there are two dropdown menus for 'REASON CODE *' and 'RESOLUTION CODE *', a text field for 'REASON NOTE' (with placeholder 'Reason Note'), and a 'SAVE' button. Red boxes highlight the search input area, the table, and the bottom action fields.

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As we've seen before, an edit will bring these extra fields:

- Select a reason code from the drop-down list.
- Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)
- Click Save.

Unknown Client Exception

Tips for preventing Unknown Client exceptions:

- Make sure approved authorization is in the Sandata EVV Portal.
- Ask employees to double-check their entries and retry when a client is not found.
- Provide employees with a Worker Visit Card with the accurate client ID.
- Remind employees to check their client ID entries.
- Make sure an accurate landline phone number is on file.

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Here are some tips for preventing Unknown Client exceptions:

- Make sure approved authorization is in the Sandata EVV Portal.
 - If the authorization has not been approved, work with payers to ensure the approved authorization is sent to DHS.
 - If the authorization is approved but delayed, EVV Customer Care can help.
 - There are some situations where an authorization is not needed by policy. Where allowed, add client information: Only clients with under 50 hours of T1019 fee-or-service, clients with home health care EVV service codes, and clients with service code 99509. In these situations, DHS allows providers to enter the required authorization information in the Sandata system. We'll cover this in the "Entering required authorization information" presentation.
- Provide employees with a Worker Visit Card with the client's information, and make sure the Client ID is accurate..
- Remind employees to double-check their entries and retry when client is not found.
- Make sure an accurate landline phone number is on file, if the exception was in a TVV visit.

Correcting Unknown Employee Exceptions

Now let's move on to correcting unknown employee exceptions. This is the other exception we saw on the dashboard.

Unknown Employee Exception

- The Unknown Employee exception shows when the Santrax ID entered during a TVV or FVV call in/call out does not match to an active employee within the Sandata EVV Portal.
- The ID entered is displayed instead of the employee's name.
- This exception type must be fixed for the visit to be in a verified status.

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This exception can happen when an employee mistypes their ID in TVV (either during a TVV check in or check out) or when calling in the FVV values. The number they typed will be displayed instead of the employee's name.

Let's go over how to fix this exception.

Unknown Employee Exception

Click the exception dot under the Employee Name column.

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out | Call Hours | Adjusted In |
|---|--|---|------------|---------|---|------------|-------------|
|  | 000-44-6258  |  | 08/14/2017 | 3:38 PM |  | | |

We're going to select and then correct—so, selecting the unknown client dot.

Unknown Employee Exception

- Use the search fields to search for an employee.
- Select an employee from the search results.
- Select a reason code from the list.

No Employee has been associated with this visit.

Find Employee

LAST NAME FIRST NAME EMPLOYEE ID # DISCIPLINE

Employee ID # Select Discipline

☐ INCLUDE INACTIVE EMPLOYEE

| Actions | Last Name | First Name | Employee ID | Santrax ID | Discipline |
|---------|-----------|------------|-------------|------------|------------|
| | | | | 9977261 | |

Showing 1 to 1 of 1 entries

« < 1 > »

REASON CODE * RESOLUTION CODE *

Reason Note

SAVE

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We're brought right to where you can correct: we'll search for an employee and add them to the visit.

Unknown Employee Exception

- Select Written Documentation Maintained from the Resolution Code drop-down menu.
- Click Save.



A screenshot of a web form titled "Unknown Employee Exception". The form contains three main fields: "REASON CODE *", "RESOLUTION CODE *", and "REASON NOTE". The "REASON CODE *" and "RESOLUTION CODE *" fields are drop-down menus. The "REASON NOTE" field is a text input. A "SAVE" button is located to the right of the "REASON NOTE" field. A red vertical line is positioned to the left of the "REASON CODE *" field. A black rectangular box highlights the "REASON CODE *" and "RESOLUTION CODE *" fields. Another black rectangular box highlights the "SAVE" button.

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Select the reason code, resolution code, and then click save.

Unknown Employee Exception

Tips for preventing Unknown Employee exceptions:

- Add new workers on ForwardHealth Portal and obtain the employee ID as soon as possible. This will also be their Santrax ID.
- Inform employees of their Santrax ID number.
- Provide employees with a Worker Visit Card, which includes the employee's Santrax ID.
- Ask employees to check their Santrax ID if it is not recognized during a TVV or FVV call in or call out and retry the entry.

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Tips for preventing Unknown Employee exceptions:

- Add new workers on the ForwardHealth Portal and obtain the employee ID as soon as possible. This will be their Santrax ID to use during visits.
- Inform employees of their Santrax ID number.
- Provide employees with a Worker Visit Card, which includes the employee's Santrax ID. Make sure it's copied down correctly.
- Ask employees to check their Santrax ID if it is not recognized during a TVV or FVV call in or call out and retry the entry.

Correcting Missing Service Exceptions

Let's take a look at Missing Service Exceptions and how to correct them.

Missing Service Exception

- The Missing Service exception shows when an incorrect service is chosen for the client in TVV or FVV.
- This type of exception must be fixed for the visit to be in a verified status.

It is important for providers to inform their employee which service to select when entering a visit. If a service is not entered, there will be a missing service exception. This type of exception must be fixed for the visit to be in a verified status.

Service Codes



www.dhs.wisconsin.gov/evv/service-codes.htm

| Service Code | SMC Service Code | TVV Service Code # |
|--|--|--------------------|
| Personal Care and Supportive Home Care Services | | |
| T1019 | Personal Care Svc/15 min | 10 |
| S5125 | Supportive Home Care/15 min | 15 |
| S5126 | Supportive Home Care/Day | 20 |
| T1020 | Personal Care/Day | 25 |
| Combo | Combo-PCS & SHC | 30 |
| 99509 | PCS Nurse Supervisory Visit/Visit | 55 |
| Home Health Care Therapy Services | | |
| 92507 | Speech Therapy Individual/Visit | 35 |
| 97139 | Unspecified Therapeutic Procedure-OT/Visit | 40 |
| 97799 | Unspecified Rehab Svc-PT/Visit | 45 |
| Home Health Care Nursing Services | | |
| 99504 | Mechanical Vent Care/Hour | 50 |
| S9123 | Private Duty Nursing RN/Hour | 65 |
| S9124 | Private Duty Nursing LPN/Hour | 70 |
| 99600 | Unspecified Home Visit-RN or LPN/Visit | 60 |
| T1001 | Nursing Assessment or Eval/Visit | 75 |
| T1021 | Home Health Aide or CNA/Visit | 80 |
| T1502 | Med Admin-Oral, IM, Subq/Visit | 85 |

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The webpage listed here gives a full list of the services codes that require EVV. In addition, a portion of the Worker Visit Card shows all the services, how they are listed on the SMC app, and what two-digit number is entered if calling it in on TVV.

Missing Service Exception

Click the exception dot under the Service column.

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out | Call Hours | Adjusted In | Adjusted Out | Adjusted Hours | Visit Status | Do Not Bill | Approved | Actions |
|-----------------------|-----------------------|---------|------------|----------|----------|------------|-------------|--------------|----------------|--------------|--------------------------|--------------------------|---|
| TestMbrSeven, Sandata | TestEmpThree, Sandata | | 07/29/2020 | 02:50 PM | 03:12 PM | 00:22 | 02:50 PM | 03:12 PM | | Incomplete | <input type="checkbox"/> | <input type="checkbox"/> |  |



Again: We'll select the exception.

Missing Service Exception

- Select the correct service from the **Service** field drop-down list.
- Select the correct **Payer** from the drop-down list.
- Select the correct **Program** from the drop-down list.

| | | | | | | | | |
|---------------------------------|--|-------------------------------------|----------------------------------|----------------------------|---------------------------------|--------------------------------------|-----------------------------|------------------|
| GENERAL | VISIT FROM DATE 08/14/2020 | VISIT TO DATE None | VISIT TIME ZONE US/Central | VISIT STATUS Incomplete | | | | |
| CLIENT | CALL IN 08:19 AM | CALL OUT None | CALL HOURS None | | | | | |
| EMPLOYEE | ADJUSTED IN DATE 08/14/2020 | ADJUSTED IN HH:MM AM/PM 08:19 AM | ADJUSTED OUT DATE MM/DD/YYYY | ADJUSTED OUT HH:MM AM/PM | | | | |
| CALL LOG | AGENCY ID 91101 | AGENCY NAME Training Account 1 | | | | | | |
| TASKS | <table border="1"> <tr> <td>PAYER Select Payer</td> <td>PROGRAM Select Program</td> <td>SERVICE Personal Care Sv</td> <td>GROUP VISIT CODE</td> </tr> </table> | | | | PAYER Select Payer | PROGRAM Select Program | SERVICE Personal Care Sv | GROUP VISIT CODE |
| PAYER Select Payer | PROGRAM Select Program | SERVICE Personal Care Sv | GROUP VISIT CODE | | | | | |
| EXCEPTIONS | CLIENT VERIFIED TIME No | CLIENT VERIFIED SERVICE No | CLIENT SIGNATURE No | | | | | |
| GPS | VISIT SOURCE WI AMP | | GENERATE GROUP VISIT CODE | | | | | |
| MEMO | <input type="checkbox"/> DO NOT BILL <input type="checkbox"/> APPROVED | | | | | | | |
| CLAIMS | <small>* indicates required field</small> <table border="1"> <tr> <td>REASON CODE Select Reason Cc</td> <td>RESOLUTION CODE Select Resolution</td> <td>REASON NOTE Reason Note</td> <td>SAVE</td> </tr> </table> | | | | REASON CODE Select Reason Cc | RESOLUTION CODE Select Resolution | REASON NOTE Reason Note | SAVE |
| REASON CODE Select Reason Cc | RESOLUTION CODE Select Resolution | REASON NOTE Reason Note | SAVE | | | | | |
| HISTORY | | | | | | | | |

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And we'll correct it.

To correct a missing service exception:

Select the correct service from the **Service** field drop-down list.

Select the correct **Payer** from the drop-down list.

Select the correct **Program** from the drop-down list.

Missing Service Exception

- Select a **Reason Code** that best explains why the service was not selected at the time of visit.
- Select the resolution code **Written Documentation Maintained**.
- Click **Save**.

| | | | | |
|-------------------|--|--|---------------------------------|-------------------------------------|
| GENERAL | VISIT FROM DATE 08/14/2020 | VISIT TO DATE None | VISIT TIME ZONE US/Central | VISIT STATUS Incomplete |
| CLIENT | CALL IN 08:19 AM | CALL OUT None | CALL HOURS None | |
| EMPLOYEE | ADJUSTED IN DATE 08/14/2020 | ADJUSTED IN HH:MM AM/PM 08:19 AM | ADJUSTED OUT DATE MM/DD/YYYY | ADJUSTED OUT HH:MM AM/PM |
| CALL LOG | AGENCY ID 91101 | AGENCY NAME Training Account 1 | | |
| TASKS | PAYER Select Payer | PROGRAM Select Program | SERVICE Personal Care Sv | GROUP VISIT CODE |
| EXCEPTIONS | CLIENT VERIFIED TIME No | CLIENT VERIFIED SERVICE No | CLIENT SIGNATURE No | |
| GPS | VISIT SOURCE WI AMP | <input type="checkbox"/> DO NOT BILL <input type="checkbox"/> APPROVED | | |
| MEMO | <input type="button" value="GENERATE GROUP VISIT CODE"/> | | | |
| CLAIMS | * Indicates required field | | | |
| HISTORY | REASON CODE * Select Reason Cc | RESOLUTION CODE Select Resolution | REASON NOTE Reason Note | <input type="button" value="SAVE"/> |

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Now we'll take care of the information at the bottom of the screen:

Select a **Reason Code** that best explains why the service was not selected at the time of visit. There's a drop-down list of options.

Select the resolution code **Written Documentation Maintained**.

Click Save.

Missing Service Exception

Tips for preventing Missing Service exceptions:

- Provide employees with the service code to select.
- If using TVV, employees will need the Sandata two-digit code for the service.
- Provide employees with a filled-out Worker Visit Card for each client. The template can be found on the DHS EVV webpage/resources:

Be sure to provide employees with the service code information they need. Provide employees with a filled-out Worker Visit Card for each client.

Correcting Unauthorized Service Exceptions

Let's move on to another kind of exception: unauthorized service exceptions

Unauthorized Service Exception

The Unauthorized Service exception shows when the service selected is not valid for the client based on their authorization. This exception can occur when:

- The employee started a visit for an unknown client.
- The employee chose the wrong service on SMC, TVV, or FVV.
- The service code selected during the visit does not match the authorization service code.

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The Unauthorized Service exception shows when the service selected is not valid for the client based on their authorization.

This exception occurs because:

- The employee started a SMC visit for an unknown client, and didn't enter the client's name or ID in the app.
- The employee chose the wrong service on the SMC app. This can happen when SMC is used without Wi-Fi. In that situation, all the services will show on the app instead of just the services the client is authorized to receive.
- The employee entered the wrong service code in TVV or FVV.

Unauthorized Service Exception

- The service date of the visit is outside the authorization effective dates.
- There are two authorizations in the Sandata EVV Portal from two different payers for the same client and timeframe.

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It can also occur when:

- The service date of the visit is outside the authorization effective dates.
- There are two authorizations in the Sandata EVV Portal from two different payers for the same client and timeframe. In this situation, the Sandata system is unable to choose and so you must do the choosing.

Unauthorized Service Exception

Click the exception dot under the Service column.

| Client ID | Client Name | Employee Name | Service | Visit Date | Call In | Call Out | Call Hours |
|-----------|-------------|---------------|-------------------------------------|------------|----------|----------|------------|
| | | Jones, Frank | | 01/09/2019 | 10:00 AM | | |
| | | Jones, Frank | Exceptions: Unauthorized Service | /18/2019 | 02:01 PM | 02:28 PM | 00:27 |

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First, you select.

Unauthorized Service Exception

- Select the correct service from the **Service** field drop-down list.
- Select the correct **Payer** from the drop-down list.
- Select the correct **Program** from the drop-down list.

| | | | | | | | | | | | | |
|-------------------|--------------------------------------|--|--|--------------------------------------|--|--|---------------------------------|--|--|----------------------------|--|--|
| GENERAL | VISIT FROM DATE 08/14/2020 | | | VISIT TO DATE None | | | VISIT TIME ZONE US/Central | | | VISIT STATUS Incomplete | | |
| CLIENT | CALL IN 08:19 AM | | | CALL OUT None | | | CALL HOURS None | | | | | |
| EMPLOYEE | ADJUSTED IN DATE 08/14/2020 | | | ADJUSTED IN HH:MM AM/PM 08:19 AM | | | ADJUSTED OUT DATE MM/DD/YYYY | | | ADJUSTED OUT HH:MM AM/PM | | |
| CALL LOG | AGENCY ID 91101 | | | AGENCY NAME Training Account 1 | | | | | | | | |
| TASKS | PAYER Select Payer | | | PROGRAM Select Program | | | SERVICE Personal Care Sv | | | GROUP VISIT CODE | | |
| EXCEPTIONS | CLIENT VERIFIED TIME No | | | CLIENT VERIFIED SERVICE No | | | CLIENT SIGNATURE No | | | | | |
| GPS | VISIT SOURCE WI AMP | | | GENERATE GROUP VISIT CODE | | | | | | | | |
| MEMO | <input type="checkbox"/> DO NOT BILL | | | <input type="checkbox"/> APPROVED | | | | | | | | |
| CLAIMS | *Indicates required field | | | | | | | | | | | |
| HISTORY | REASON CODE * Select Reason Cc | | | RESOLUTION CODE Select Resolution | | | REASON NOTE Reason Note | | | SAVE | | |

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Now you correct.

- Select the correct service from the **Service** field drop-down list.
- Select the correct **Payer** from the drop-down list.
- Select the correct **Program** from the drop-down list.

Unauthorized Service Exception

- Select the reason code that best explains why the service was not selected at the time of visit.
- Select the resolution code Written Documentation Maintained.

The screenshot shows a web form titled "Unauthorized Service Exception". On the left is a sidebar with buttons: GPS, MEMO, CLAIMS, and HISTORY. The main form area contains several input fields and checkboxes. At the bottom, there are three dropdown menus: "REASON CODE *" (with "Select Reason Cod" as the current selection), "RESOLUTION CODE" (with "Select Resolution C" as the current selection), and "REASON NOTE" (with "Reason Note" as the current selection). A large orange arrow points to the "REASON CODE *" dropdown. To the right of these dropdowns is a "SAVE" button. Other fields in the form include "SUBJECT ID" (9634), "PAYER" (ODM), "PROGRAM" (SPHH), "CLIENT VERIFIED TIME" (No), "CLIENT VERIFIED SERVICE" (No), "CLIENT SIGNATURE" (No), "VISIT SOURCE" (SANDATA), "DO NOT BILL" (checkbox), and "APPROVED" (checkbox).

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And as usual, finish with the reason code and resolution code.

Unauthorized Service Exception

Click Save.

The screenshot shows a web form for 'Unauthorized Service Exception'. On the left is a sidebar with buttons: GPS, MEMO, CLAIMS, and HISTORY. The main form contains several input fields and checkboxes. A red rectangular box highlights the bottom section of the form, which includes 'REASON CODE *' (a dropdown menu showing 'Select Reason Code'), 'RESOLUTION CODE' (a dropdown menu showing 'Select Resolution C'), 'REASON NOTE' (a text input field), and a 'SAVE' button. An orange arrow points from the right towards the 'SAVE' button. Other fields in the form include 'AGENCY ID' (9634), 'AGENCY NAME' (Provider Training Agency 20), 'PAYER' (ODM), 'PROGRAM' (SPHH), 'SERVICE' (a dropdown menu showing 'SPHH - SPHH'), 'CLIENT VERIFIED TIME' (No), 'CLIENT VERIFIED SERVICE' (No), 'CLIENT SIGNATURE' (No), 'VISIT SOURCE' (SANDATA), 'DO NOT BILL' (checkbox), and 'APPROVED' (checkbox).

66

And save.

Unauthorized Service Exception

Tips for preventing unauthorized service exceptions:

- Make sure approved authorization service codes and effective dates are in the Sandata EVV Portal.
- Inform employees of the correct service to select when entering a visit.
- Provide employees with a Worker Visit Card for each client.
- Ensure employees have the correct two-digit code for the service to use when entering a visit through TVV or FVV.

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Tips for preventing unauthorized service exceptions:

- Make sure approved authorization service codes and effective dates are in the Sandata EVV Portal.
- Inform employees of the correct service to select when entering a visit.
- Provide employees with a Worker Visit Card for each client.
- Ensure employees have the correct two-digit code for the service to use when entering a visit through TVV or FVV.

As you can see, a lot of errors can be prevented by making sure employees have the information they need during a visit.

Unauthorized Service Exception

- Use Sandata reports:
 - The Expiring Authorizations report tracks authorizations that are close to expiring.
 - The Members Without Authorization report tracks clients that have no authorizations on file.

These Sandata reports can help to monitor authorizations that may be missing or soon to expire.

Unauthorized Service Exception

- If an approved authorization is not loaded to Sandata in three days of being notified by the payer of the approval, contact EVV Customer Service.
- There are some situations where an authorization is not needed by policy. To get the information loaded to the Sandata system, providers will need to enter it. We'll cover this in the "Entering required authorization information" presentation.

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DHS sends authorizations to the Sandata system. If approved authorization is not loaded to Sandata in three days of being notified by the payer of the approval, contact EVV Customer Service.

There are some situations where an authorization is not needed by policy. To get the information loaded to the Sandata system, providers will need to enter it. We'll cover this in the "Entering required authorization information" presentation. Entering in the required information will prevent an unauthorized service exception.

Correcting Unmatched Client Phone/ID Exceptions

Now let's learn how to correct unmatched client phone/ID exceptions

Unmatched Client Phone/ID

- The Unmatched Client Phone/ID exception shows when the phone number the call was made from is not a number listed in the Sandata EVV Portal for the client.
- This exception type must be acknowledged for the visit to be in a verified status.

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- The Unmatched Client Phone/ID exception shows when the landline phone number the call was made from is not a number listed in the Sandata EVV Portal for the client.
- This exception type must be acknowledged for the visit to be in a verified status.

Click the exception dot under the Client Name column.

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Unmatched Client Phone/ID

Click on the **Acknowledge This Exception** checkbox on the Unmatched Client ID/Phone exception line.

| | |
|---|---|
|  Unmatched Client ID / Phone | <input checked="checked" type="checkbox"/> ACKNOWLEDGE THIS EXCEPTION |
|---|---|

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Now, we'll correct. Acknowledging an exception is as easy as this: Check the box that says, "Acknowledge this exception."

Unmatched Client Phone/ID

- Select a **reason code** and a **resolution code** from the dropdown menu.
- Click **Save**.
- The Call Log screen displays the originating phone number for the call.

| | | | |
|-----------------|-------------------|-------------------|------|
| REASON CODE * | RESOLUTION CODE | REASON NOTE | |
| Select Reason ▼ | Select Resoluti ▼ | Enter Reason Note | SAVE |

| | | | | |
|----------|------------|---------------------|----------------|-----------------------|
| GENERAL | CALL IN | | | CLIENT ID# 0059647013 |
| CLIENT | CALL DATE | CALL TIME | CALL TYPE | SERVICE |
| | 08/16/2017 | 6:48 AM | EW (telephony) | N/A |
| EMPLOYEE | USER | ORIGINATING PHONE # | CALL SOURCE | |
| CALL LOG | 000106825 | (718) [REDACTED] | SANDATA | |

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As usual, select the reason code, resolution code, and save.

You can see the phone number used for the visit in the Call Log screen.

Unmatched Client Phone/ID

Tips for preventing Unmatched Client Phone/ID exceptions:

- Ensure the TVV calls are made from the landline phone listed in the Sandata Client file.
- Compare Sandata's record of the client's phone number with the provider's record by using the **Active Clients report**.

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Tips for preventing Unmatched Client Phone/ID exceptions:

- Ensure the TVV calls are made from the landline phone listed in the Sandata Client file.
- Compare Sandata's record of the client's phone number with the provider's record by using the **Active Clients report**.

Unmatched Client Phone/ID

- Help clients keep address and phone number information up-to-date through ACCESS, their Consortia, their Family Care MCO, or IRIS consultant agency (ICA).
- For most programs, the client can report changes to their local income maintenance agency or tribe online on the ACCESS website or by using the Information Change Report.
- Including other applicable entities such as the Social Security Administration, SSI record, and the foster care system.

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A client's responsibility to keep their address and phone number information up-to-date has not changed:

- This is typically done through ACCESS, their Consortia, their Family Care MCO, or IRIS consultant agency (ICA).
- For most programs, the client can report changes to their local income maintenance agency or tribe online on the ACCESS website or by using the Information Change Report.
- Clients are also responsible for updating other applicable entities such as the Social Security Administration, SSI record, and the foster care system.

Unmatched Client Phone/ID

- For IRIS clients:
 - Contact their IRIS consultant, who can update that information in the DHS IRIS system. The IRIS consultant can use the Family Care, Partnership, PACE, or IRIS Change Routing form, F-02404 (www.dhs.wisconsin.gov/forms/f02404.docx)
 - Contact their ICA.
 - Contact the IRIS Call Center for assistance: 888-515-4747.

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IRIS clients have these resources to assist them, as well:

- IRIS consultant
- IRIS Consultant Agency
- IRIS Call Center

Unmatched Client Phone/ID

- Add a valid and verifiable phone number to the Sandata client file to prevent this exception. This will not update any other systems.

Refer to the Client Data section of the DHS EVV Training website:

www.dhs.wisconsin.gov/evv/training-administrators.htm

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And finally, if this is a valid landline that will be used again:

- Add a valid and verifiable phone number to the Sandata client file to prevent this exception. This will not update any other systems.

Refer to the Client Data section of the DHS EVV Training website for a video or PowerPoint about how to add a phone number:

www.dhs.wisconsin.gov/evv/training-administrators.htm

Correcting a Visit with a Missing Call in or Call out Exceptions

Now let's talk about how to correct visit missing a call in or call out exceptions

Visit Without Check In/Check Out

This exception shows a visit that does not have either a call in or call out time.

Reminder: Sandata refers to call in and out for all methods: SMC, TVV, or FVV.

- Administrators should try the Merge Call function first. If that is not an option, the missing call time can be added.

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The “visit without call in/call out” exception shows a visit that does not have either a call in or call out time.

•There are two ways to handle this exception:

1. Administrators should try the Merge Call function first.
2. If that is not an option, the missing call time can be added.

Visit Without Check In/Check Out

Tips for preventing missing call in/call out exceptions:

- Train employees on the importance of using EVV for both the call in and call out times.
- Note trends in the employee's use of EVV and offer additional training if needed.
- Set goals with each employee to improve their EVV use. Help them use reminders, such as a cell phone alert, timer bell, or co-worker reminder.

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Tips for preventing missing call in/call out exceptions:

- Train employees on the importance of using EVV for both the call in and call out times.
- Note trends in the employee's use of EVV and offer additional training if needed.
- Set goals with each employee to improve their EVV use. Help them use reminders, such as a cell phone alert, timer bell, or co-worker reminder.

Merging Calls

Now let's talk about the first possibility to take care of a missing call in or out: merging calls.

Merging Calls

The **Merge Calls** button in Visit Details will display if the system shows several incomplete calls that may be able to merge to provide one complete visit. The incomplete calls have overlapping information, including:

- Same employee ID
- Same date of service
- Same client

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Merging calls is a clever way the Sandata system has of correction an exception.

The Merge Calls button will display only if the system shows several incomplete calls that could merge to provide one complete visit. The incomplete calls have overlapping information, including:

- Same employee ID
- Same date of service
- Same client

You'll notice the button when you're in the Visit Details screen. Let's go through an example.

Merging Calls


Click the **edit** icon to select client.

Show Legend

ROWS PER PAGE: 50

Show Display Options

Showing 1 to 1 of 1 entries

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out | Call Hours | Adjusted In | Adjusted Out | Adjusted Hours | Visit Status | Do Not Bill | Approved | Actions |
|-------------------|---------------|----------------------------|------------|----------|----------|------------|-------------|--------------|----------------|--------------|--------------------------|--------------------------|---|
| Crandell, Melissa | | Supportive Home Care/15min | 08/09/2020 | 08:58 AM | | | 08:58 AM | | | Incomplete | <input type="checkbox"/> | <input type="checkbox"/> |  |

Here you have a visit with some missing information. As usual, you select the exception or the pencil icon to start edits.

Merging Calls

Click **Merge Calls** button to view other calls that can be merged to the visit.



Visit Details Visit Start Date: 07/10/2020 ×

| | | | | |
|--------------|-------------|---------------|---------------------|---------------|
| CLIENT NAME | CLIENT ID # | MEDICAID ID # | EMPLOYEE NAME | EMPLOYEE ID # |
| MRBOne, Test | 273504 | 9900082899 | TestEmpEight, Sa... | 999955554 |

GENERAL
CLIENT
EMPLOYEE
CALL LOG
MERGE CALLS
TASKS
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY

Below is a list of all calls that are close to the scheduled time.

| PHONE # | CALL TIME | CALL DATE | CLIENT NAME | EMPLOYEE NAME |
|--------------------------------------|-----------|-----------|---------------|-----------------------|
| <input type="radio"/> (608) 295-XXXX | 12:11 PM | 7/10/2020 | (608)295-XXXX | TestEmpEight, Sandata |

Showing 1 to 1 of 1 entries

« < 1 > »

CANCEL

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Now you start to correct. When the Visit Details screen opens, you see the “Merge Calls” button is available to use. That’s good news! Click on the Merge Calls button to view other incomplete calls that may be related to this one. Here, one possible match came up.

You may need to confirm with the employee or client to be sure this possible match is accurate to the visit. In this example, you see the client’s name at the very top, but the possible match-up call listed here only has a phone number the system didn’t recognize. If the time and other details can be confirmed, you have a match.

Merging Calls

- Click the radio button of the line item to merge call with.
- From the drop-down menu, click the **reason code** and **resolution code**.
- Enter a **reason note** if needed.

Visit Details Visit Start Date: 07/10/2020

| CLIENT NAME | CLIENT ID # | MEDICAID ID # | EMPLOYEE NAME | EMPLOYEE ID # |
|--------------|-------------|---------------|---------------------|---------------|
| MRBOne, Test | 273504 | 9900002899 | TestEmpEight, Sa... | 999955554 |

GENERAL
CLIENT
EMPLOYEE
CALL LOG
MERGE CALLS
TASKS
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY

Below is a list of all calls that are close to the scheduled time.

| PHONE # | CALL TIME | CALL DATE | CLIENT NAME | EMPLOYEE NAME |
|--|-----------|-----------|--------------|-----------------------|
| <input checked="" type="radio"/> (608) 295-... | 12:11 PM | 7/10/2020 | (608)295-... | TestEmpEight, Sandata |

Showing 1 to 1 of 1 entries

« < 1 > »

REASON CODE *
Select Reason Code ▾

RESOLUTION CODE
Select Resolution Co ▾

REASON NOTE
Reason Note

SAVE

CANCEL

Once you're sure these details are accurate for the visit, select the call to merge it.

As usual when there are edits, the reason and resolution fields will display.

Merging Calls

Click **Save**.

The screenshot shows the 'Visit Details' form in the Sandata system. The form is titled 'Visit Details' and includes a 'Visit Start Date' of 07/10/2020. The form is divided into several sections: 'CLIENT NAME', 'CLIENT ID #', 'MEDICAID ID #', 'EMPLOYEE NAME', and 'EMPLOYEE ID #'. The 'CLIENT NAME' is 'MRBOne, Test', 'CLIENT ID #' is '273504', 'MEDICAID ID #' is '9900082899', 'EMPLOYEE NAME' is 'TestEmpEight, Sa...', and 'EMPLOYEE ID #' is '999955554'. Below these fields is a sidebar with buttons for 'GENERAL', 'CLIENT', 'EMPLOYEE', 'CALL LOG', 'MERGE CALLS', 'TASKS', 'EXCEPTIONS', 'GPS', 'MEMO', 'CLAIMS', and 'HISTORY'. The 'MERGE CALLS' button is highlighted. The main content area shows a table of calls with columns 'PHONE #', 'CALL TIME', 'CALL DATE', 'CLIENT NAME', and 'EMPLOYEE NAME'. The table contains one entry: '(608) 295-...', '12:11 PM', '7/10/2020', '(608)295-...', and 'TestEmpEight, Sandata'. Below the table is a 'Showing 1 to 1 of 1 entries' message and a pagination control. At the bottom of the form is a 'CANCEL' button. A red box highlights the 'MERGE CALLS' button and the table entry.

| PHONE # | CALL TIME | CALL DATE | CLIENT NAME | EMPLOYEE NAME |
|---------------|-----------|-----------|--------------|-----------------------|
| (608) 295-... | 12:11 PM | 7/10/2020 | (608)295-... | TestEmpEight, Sandata |

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And click save.

In this way, the Sandata system has allowed you to correct two different rows in visit maintenance (two mystery visits) with one set of edits.

Adding a Manual Call

We can't always be lucky enough to have calls merge. Here's the second way to add missing call information: adding a manual call.

Add Manual Call

- Check for the Merge Calls button before adding a call in or out.
- Verify the missing call in or out time with the employee.
- Add a manual call if a visit is missing a call in or call out time.

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- Check for the Merge Calls button before adding a call in or out. We've just seen what a timesaver this can be. Use it when you can.
- Verify the missing call in or out time with the employee.
- If a merge option isn't available, edit to include the missing time. This is what we mean by "a manual call."

Let's look at an example.

Add Manual Call


Click the **edit** icon to select client.

◀ < 1 > ▶

Show Legend

ROWS PER PAGE: 50 Show Display Options ▼

Showing 1 to 1 of 1 entries

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out | Call Hours | Adjusted In | Adjusted Out | Adjusted Hours | Visit Status | Do Not Bill | Approved | Actions |
|-------------|-------------------|----------------------------|------------|----------|----------|------------|-------------|--------------|----------------|--------------|--------------------------|--------------------------|---|
| | Crandell, Melissa | Supportive Home Care/15min | 08/09/2020 | 08:58 AM | ● | | 08:58 AM | | | Incomplete | <input type="checkbox"/> | <input type="checkbox"/> |  |

As usual: you will select, either by clicking on the exception dot or using the edit pencil.

Add Manual Call

Click the **Call Log** button.



GENERAL

CLIENT

EMPLOYEE

CALL LOG

TASKS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

| CALL IN | | CLIENT ID# | |
|--------------------------|-------------------|--------------------|----------------------------|
| CALL DATE | CALL TIME | CALL TYPE | SERVICE |
| 09/26/2020 | 02:19 PM | MVV (Mobile, GPS) | Supportive Home Care/15min |
| USER | LATITUDE | LONGITUDE | CALL SOURCE |
| alfredaa@mailinator.c... | 43.18011114538419 | -90.13359218035939 | WI AMP |
| TIME ZONE | | | |
| America/Chicago | | | |

Add Manual Call

* indicates required field

CALL DATE * MM/DD/YYYY

CALL TIME * HH:MM AM/PM

SERVICE

TIME ZONE

REASON CODE *

RESOLUTION CODE

REASON NOTE

ADD

MM/DD/YYYY

10:04 AM

Select Service

US/East-Indiana

Select Reason Coc

Select Resolution

Reason Note

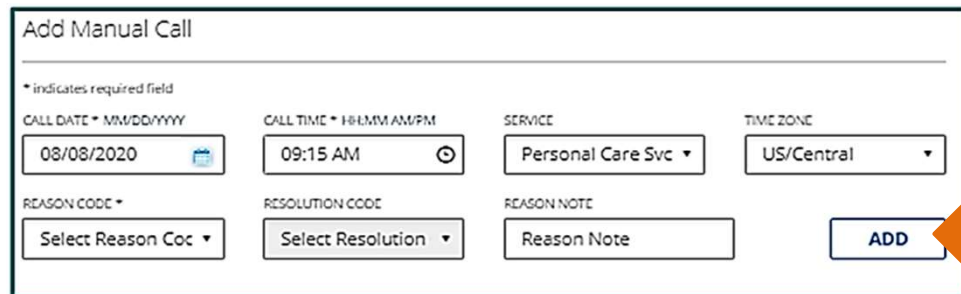
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In this example, a Merge Calls button does not appear. There aren't any calls that the system thinks could complete this one, so we'll ask the employee or client for the details, then create the call.

Click on the Call Log button to open that section.

Add Manual Call

- Enter the missing call information.
- Select a **reason code and resolution code** from the drop-down menus.
- Click **Add**.



The screenshot shows a web form titled "Add Manual Call". At the top, it says "* indicates required field". The form has four rows of input fields:

- Row 1: "CALL DATE * MM/DD/YYYY" with a date picker showing "08/08/2020"; "CALL TIME * HH:MM AM/PM" with a time picker showing "09:15 AM"; "SERVICE" with a dropdown menu showing "Personal Care Svc"; and "TIME ZONE" with a dropdown menu showing "US/Central".
- Row 2: "REASON CODE *" with a dropdown menu showing "Select Reason Coc"; "RESOLUTION CODE" with a dropdown menu showing "Select Resolution"; "REASON NOTE" with a text input field showing "Reason Note"; and an "ADD" button.

An orange arrow points to the "ADD" button.

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Now you correct. Enter the missing call information's date and time.
Select a reason code and resolution code from the drop-down menus.
Click Add.

Adjusting a Visit Call In or Call Out

Sometimes an employee may let you know the time they called in or out for their visit wasn't accurate. Maybe they needed to provide vital care to the client before checking in, or maybe they forgot to check out until a half hour later.

Here's how to adjust a visit's call in or call out time.

Adjusting Call In or Call Out

- Providers can correct or adjust a call in or call out time if the employee reports they have captured the EVV visit time incorrectly.
- Adjusting call in or call out times can be done on any visit if necessary, including verified visits.

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Providers can correct or adjust a call's in or call out time if the employee reports they have captured the EVV visit time incorrectly.

Adjusting call in or call out times can be done on any visit if necessary, including verified visits.

Remember: There is no scheduling component in the DHS-provided Sandata system. A visit that was perfectly submitted but for a timeframe that wasn't according to expectations won't have any exceptions flagged.

For many of our examples so far, we've had exceptions to show us what visits needed attention. How will you find a visit that has inaccurate time, but is otherwise perfect?

Adjusting Call In or Call Out

Search for a visit using the “All Visits” filter and select the client by clicking on the edit icon.

The screenshot shows a web application interface for managing visits. At the top, there are search filters including a date range (08/10/2020 to 08/10/2020), client name, employee name, category, payer, visit status, and client Medicaid ID. A dropdown menu for 'FILTER VISITS BY' is highlighted, showing 'All Visits' as the selected option. Below the filters are buttons for 'SEARCH', 'CLEAR', and 'EXPORT'. A table of visits is displayed below the filters, with columns for Client Name, Employee Name, Service, Visit Date, Call In, Call Out, Call Hours, Adjusted In, Adjusted Out, Adjusted Hours, Visit Status, Do Not Bill, Approved, and Actions. The table shows two visits for 'Lang, Beth' on 08/10/2020. The first visit is for 'COMBO - PCS & SHC' with a call in of 06:14 AM and a call out of 06:47 AM. The second visit is for 'Personal Care Svc/15min' with a call in of 06:14 AM and a call out of 06:46 AM. The 'Actions' column for the second visit contains an edit icon (a pencil inside a square).

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out | Call Hours | Adjusted In | Adjusted Out | Adjusted Hours | Visit Status | Do Not Bill | Approved | Actions |
|-------------|---------------|-------------------------|------------|----------|----------|------------|-------------|--------------|----------------|--------------|--------------------------|--------------------------|---------|
| Lang, Beth | | COMBO - PCS & SHC | 08/10/2020 | 06:14 AM | 06:47 AM | 00:33 | 06:14 AM | 06:47 AM | | Verified | <input type="checkbox"/> | <input type="checkbox"/> | |
| Lang, Beth | | Personal Care Svc/15min | 08/10/2020 | 06:14 AM | 06:46 AM | 00:32 | 06:14 AM | 06:46 AM | | Verified | <input type="checkbox"/> | <input type="checkbox"/> | |

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We'll have to search for the visit in a way that includes visits without exceptions. Remember this starting screen, where you set up all our search parameters? When searching for a specific client visit to adjust, use the “Filter visits by: All Visits” filter. This will include visits that don't have exceptions. You can enter in a date span and client or employee name that will bring you to exactly the visit you need.

We're going to select the visit you need to edit by choosing the edit icon on the right.

Adjusting Call In or Call Out

Enter the corrected information in the Adjusted In or Adjusted Out fields.

The screenshot shows a 'Visit Details' form with a sidebar on the left containing tabs: GENERAL, CLIENT, EMPLOYEE, CALL LOG, TASKS, EXCEPTIONS, GPS, MEMO, CLAIMS, and HISTORY. The 'GENERAL' tab is selected. The form contains the following fields:

| CLIENT NAME | | CLIENT ID # | MEDICAID ID # | EMPLOYEE NAME | EMPLOYEE ID # |
|-------------|--|-------------|---------------|---------------|---------------|
| | | 554365 | 1112221019 | Leng, Beth | 100006109 |

| VISIT FROM DATE | VISIT TO DATE | VISIT TIME ZONE | VISIT STATUS |
|-----------------|---------------|------------------|--------------|
| 08/10/2020 | 08/10/2020 | America/New_York | Verified |

| CALL IN | CALL OUT | CALL HOURS |
|----------|----------|------------|
| 06:14 AM | 06:47 AM | 00:33 |

| ADJUSTED IN DATE | ADJUSTED IN HH:MM AM/PM | ADJUSTED OUT DATE | ADJUSTED OUT HH:MM AM/PM |
|------------------|-------------------------|-------------------|--------------------------|
| 08/10/2020 | 06:14 AM | 08/10/2020 | 06:47 AM |

| AGENCY ID | AGENCY NAME |
|-----------|--------------------|
| 91101 | Training Account 1 |

| PAYER | PROGRAM | SERVICE | GROUP VISIT CODE |
|---------|-----------|-----------------|------------------|
| PREMIER | WIIRISFEA | COMBO - PCS & ! | 013775 |

| CLIENT VERIFIED TIME | CLIENT VERIFIED SERVICE | CLIENT SIGNATURE |
|----------------------|-------------------------|------------------|
| Yes | Yes | Yes |

| VISIT SOURCE |
|--------------|
| WI AMP |

☐ DO NOT BILL ☐ APPROVED

And now you correct.

From the GENERAL tab, correct information in the Adjusted In or Adjusted Out fields.

Adjusting Call In or Call Out

- Select the reason code, resolution code, and reason note if needed.
- Click **Save**.

| | | | |
|--------------------|---------------------|-------------|-------------|
| REASON CODE * | RESOLUTION CODE | REASON NOTE | |
| Select Reason Cc ▼ | Select Resolution ▼ | Reason Note | SAVE |

As usual, select the reason code, resolution code, and add a note if you'd like. Save.

Create Call

Creating a call is different from the manual call that you just went over. Let's take a look.

Create Call

Providers can create an entire visit in the Sandata EVV Portal by using the Create Call button.

- Difference between Create Call and Manual Call:
 - **Manual Call** is used when a visit exists but is missing a single call in or call out time.
 - **Create Call** is used when an entire visit was not captured by EVV.

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Providers can create an entire visit in the Sandata EVV Portal by using the Create Call button.

- What's the difference between Create Call and Manual Call?
 - Manual Call** is used when a visit exists but is missing a single call in or call out time. We might be able to merge with another incomplete visit, or you may need to add a in or out time.
 - Create Call** is used when an entire visit was not captured by EVV.

Let's take a look.

Create Call

- Confirm the visit is missing by using “All Visits” from the **Filter Visits By** drop down menu.
- If the visit is missing, click the **Create Call** button.

The screenshot shows a web application interface for selecting a visit. On the left is a blue sidebar with navigation links: 'Navigate Modules', 'Dashboard', 'Clients', 'Employees', 'Visit Maintenance', 'Reports', and 'Security'. The main content area is titled 'Select a Visit' and contains several input fields. An orange arrow labeled '1' points to the 'FILTER VISITS BY' dropdown menu, which is currently set to 'All Visits'. Another orange arrow labeled '2' points to the 'CREATE CALL' button in the top right corner of the form. The form fields include: 'DATE RANGE' (MM/DD/YYYY) with '10/22/2021' entered; 'CLIENT' (text input 'Enter Client'); 'EMPLOYEE' (text input 'Enter Employee'); 'PAYER' (dropdown 'Select Payer'); 'PROGRAM' (dropdown 'Select Program'); 'SERVICE' (dropdown 'Select Service'); 'CATEGORY' (dropdown 'Select Category'); 'VISIT STATUS' (dropdown 'Select Visit Status'); 'CLIENT MEDICAID ID' (text input 'Enter Client Medicaid ID'); and 'FILTER VISITS BY' (dropdown 'All Visits').

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•Before you go through the work of creating an entire visit, confirm the visit is truly missing. Just as we did before, we’ll use “All Visits” from the **Filter Visits By** drop down menu. Fill in the other fields—date, client, employee—and perform the search.

•If the visit doesn’t already exist, click the **Create Call** button.

Create Call

1. Enter client search criteria.
2. Click **Search**.
3. Select the client.
4. Click **Next**.

The screenshot shows the 'Create New Call' interface. At the top, there are three tabs: '1. Find Client', '2. Find Employee', and '3. Set Date and Time'. The '1. Find Client' tab is active. Below the tabs, there is a 'Select Client' section with several input fields: 'CLIENT FIRST NAME' (containing 'Mary'), 'CLIENT LAST NAME' (placeholder 'Enter Client Last Name'), 'CLIENT MEDICAID ID' (placeholder 'Enter Client Medicaid ID'), 'CATEGORY' (dropdown 'Select Category'), 'SUPERVISOR' (dropdown 'All'), 'PAYER' (dropdown 'Select Payer'), and a checkbox for 'LAST ACTIVE DATE'. A blue 'Q SEARCH' button is located below these fields. Below the search section is a table with columns: 'Client ID', 'Client Name', 'Client Medicaid ID', 'Supervisor', and 'Select'. The table contains one row with the following data: '977381', 'Mary', '1112221018', and a camera icon in the 'Select' column. At the bottom right of the table are navigation buttons: 'PREVIOUS', 'NEXT', and 'CANCEL'. Four orange arrows with numbers 1 through 4 indicate the sequence of actions: 1 points to the 'CLIENT FIRST NAME' field, 2 points to the 'Q SEARCH' button, 3 points to the camera icon in the 'Select' column of the table, and 4 points to the 'NEXT' button.

The Create New Call screen will open. Notice that there are tabs along the top of the screen. These tabs will lead you through each detail of the call.

On this first tab, Find Client, we'll move down the screen.

(Note: the arrows will fly in with mouse clicks.)

First, fill in the client information. It doesn't have to be all the fields—just enough so you're not getting a long list in your results.

Click Search.

In this example, only one client matched the search criteria. Select the client's row. Then click Next.

Create Call

1. Enter employee name.
2. Click **Search**.
3. Select the employee.
4. Click **Next**.

The screenshot shows the 'Create New Call' interface. At the top, there are three tabs: '1. Find Client', '2. Find Employee' (which is selected and highlighted with an orange box), and '3. Set Date and Time'. Below the tabs, the 'Find Employee' section is titled 'Select Employee'. It contains two input fields: 'EMPLOYEE FIRST NAME' with the value 'Amy' and 'EMPLOYEE LAST NAME' with the placeholder 'Enter Employee Last Name'. There is also a checkbox for 'LAST ACTIVE DATE'. A blue 'Q. SEARCH' button is located below the first name field. Below the search fields is a table with two columns: 'Employee ID' and 'Employee Name'. The table contains one row with the values '100006104' and 'Briggs, Amy'. To the right of the table is a 'Select' button with a magnifying glass icon. At the bottom right, there are navigation buttons: 'PREVIOUS', 'NEXT', and 'CANCEL'. Four orange arrows with numbers 1 through 4 indicate the sequence of actions: 1 points to the first name input field, 2 points to the 'Q. SEARCH' button, 3 points to the 'Select' button, and 4 points to the 'NEXT' button.

Notice that we've advanced to the second tab at the top of the screen. You can go backwards to the previous tab if you need to.

(Note: the arrows will fly in with mouse clicks.)

On this tab, we'll search for the employee:

1. Enter at least part of the employee's name.
2. Click Search.
3. In this example, only one employee matched the search criteria. Select the employee's row.
4. Then click Next.

Create Call

1. Set date and time (call in time); verify Time Zone.
2. Select **Service**.
3. Click **Finish**.

Create New Call

1. Find Client 2. Find Employee 3. Set Date and Time

Set Date and Time

* Indicates required field

CALL DATE * MM/DD/YYYY
10/04/2021

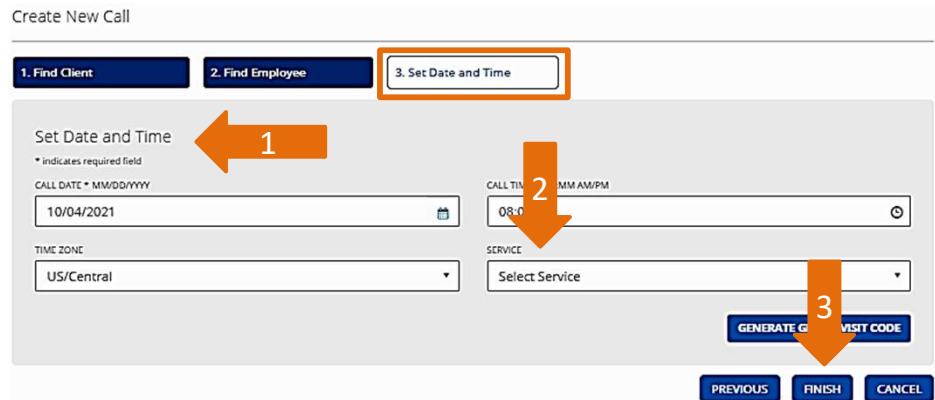
TIME ZONE
US/Central

CALL TIME * MM:AM/PM
08:00

SERVICE
Select Service

GENERATE G VISIT CODE

PREVIOUS FINISH CANCEL



Now we're on the final tab.

(Note: the arrows will fly in with mouse clicks.)

- Enter date and time for the call in time.
- Verify Time Zone is set to US/Central
- Click Finish.

A confirmation screen will display.

But what are we still missing? What we've done is entered only the call in time. This visit will have a missing call out and have an exception. We'll need to go into Visit Maintenance and create a manual call out date and time, just like we've seen before.

Omit Status

We have a few last tools to introduce to you. The first is setting a visit line's status to "Omit." We've already heard about "omit" as a Visit Status. Here is how that status comes about.

Omit Status

Visit information is never deleted from the Sandata EVV Portal. Calls that are accidental or not needed can be set apart from regular view by assigning an “Omit” status to them. This is useful for:

- Robocalls
- Practice calls during training

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Visit information is never deleted from the Sandata EVV Portal. Calls that are accidental or not needed can be set apart from regular view by assigning an “Omit” status to them. This is useful for calls that you’d not want to bring to a verified status or pass along to a payer. For example:

- Robocalls
- Practice calls during training

Omit Status

Robocalls may come in to the TVV toll-free number.

- No employee and client information
- No call out
- No service code

Practice calls are helpful during training but risk being mistaken for actual visits.

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Sometimes you may notice visits with exceptions almost all the way across. These may be from robocalls to the TVV line. Robocalls can happen to a TVV toll-free phone line just as they do to our personal phone lines. You can identify robocalls because there's no information entered, only a time and date in.

- No employee and client information
- No call out
- No service code

Providing hands-on experience with the SMC app, TVV, or even FVV is a great training technique. They will result in visit information within the Sandata EVV Portal, however.

Assigning an "Omit" status is a good way to set both types of calls aside so they don't appear as exceptions needing to be handled or calls that may be sent to payers.

Setting Omit Status

- Within the visit's row, mark the **Do Not Bill** box.
- Provide reason code and optional note, then **Save**.

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out | Call Hours | Adjusted In | Adjusted Out | Adjusted Hours | Visit Status | Do Not Bill | Approved | Actions |
|--------------|-------------------|----------------------------|------------|----------|----------|------------|-------------|--------------|----------------|--------------|--------------------------|--------------------------|---------|
| BASKIN, MARY | Crandell, Melissa | Supportive Home Care/15min | 08/09/2020 | 08:58 AM | | | 08:58 AM | | | Incomplete | <input type="checkbox"/> | <input type="checkbox"/> | |

Update Do Not Bill

REASON CODE

Select Reason Code

RESOLUTION CODE

Select Resolution Code

REASON NOTE

Enter Reason Note

SAVE

CANCEL

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A helpful way to set these calls aside is to check the “Do not bill” box within the row. This is a confusing title, since the DHS-provided Sandata system does not include billing. It does what it needs to, however: it separates or omits these unwanted visits from the list of actual visits.

The pop-up box seen here will display when you mark the “Do Not Bill” box. Fill out the required reason code, a note if you’d like, and save.

Visit Verification, Client Signature, and Tasks

Let's move on to two topics that are NOT exceptions – visit verification, client signature, and tasks.

Visit Verification, Client Signature, and Tasks

- Fee-for-service personal care providers may choose to use the Sandata EVV Portal to capture all elements of the record of care.
- Personal care providers should check with their HMOs, MCOs, or IRIS FEA regarding documentation requirements.
- Home health care service providers will not be able to capture record of care within EVV.

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- Fee-for-service personal care providers may choose to use the Sandata EVV Portal to capture all elements of the record of care.
- Personal care providers should check with their HMOs, MCOs, or IRIS FEA regarding documentation requirements.
- Home health care service providers will not be able to capture record of care within EVV.

Visit Verification, Client Signature, and Tasks

- If any part of the record of care is missing from the Sandata EVV Portal, it will not set a visit exception.
- Providers can monitor record of care data collection using the Sandata **Employee Visit Log** date range report.

Employee Visit Log

| | | | | | | | | | | | | | | | | |
|---------------------------|-------|------------|----------|----------|-------|----------|--|---------|---|---------|------------------|-------------|------------|------|--------------------|-----|
| PAYER: CAREWFCP | | | | | | | | | | | | | | | | |
| VISIT | | | | | | | LOCATION IN | | LOCATION OUT | | EMPLOYEE | | CLIENT | | | |
| PRG | SRV | DATE | TIME IN | TIME OUT | HOURS | STATUS | LATITUDE, LONGITUDE | PHONE # | LATITUDE, LONGITUDE | PHONE # | NAME | EMPLOYEE ID | SANTRAX ID | NAME | ID / MEDICAID | SIG |
| WMCO | T1020 | 10/22/2021 | 10:01 PM | 10:09 PM | 0.13 | Verified | 48.07033858833380290 -91.18027658972484 | | 48.07033810531599 -91.18027691815167 | | Andrews, Alfreda | 100009123 | 100008123 | | 890183 / 112221624 | N |
| Task List: 0120,0300,0310 | | | | | | | | | | | | | | | | |
| Total Hours: 0.13 | | | | | | | | | | | | | | | | |

Sandata

10/22/2021 22:14:16

Page 1 of 3

GPS Location

Another topic that is not an exception is GPS.

GPS Location

At this time, the GPS location data is informational only.

- GPS captures location information only at the start and end of a visit.
- GPS location data does not prevent the EVV visit from going to a “verified” status.
- GPS data does not currently prevent claims from being paid.

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At this time, the GPS location data is informational only:

- GPS captures location information only at the start and end of a visit.
- GPS location data is required but does not prevent the EVV visit from going to a “verified” status.
- GPS data does not currently prevent claims from being paid.

Also understand that other divisions within DHS, such as the Office of Inspector General, may use GPS location data to ensure providers bill for covered services.

GPS Location

How to find the GPS location information for a specific visit:

- In Visit Maintenance, click on a visit.
- From the Visit Detail screen, click the **GPS** button to view the location map.



| |
|------------|
| GENERAL |
| CLIENT |
| EMPLOYEE |
| CALL LOG |
| TASKS |
| EXCEPTIONS |
| GPS |
| MEMO |
| CLAIMS |
| HISTORY |

To find GPS location information for a specific visit:

- In Visit Maintenance, click on a visit.
- From the Visit Detail screen, click the **GPS** button to view the location map.

GPS Location

This location map shows a GPS informational “exception” where the check in and out were not done near the client’s home.



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This location map shows a GPS “exception” (informational only). Check in and out were not done in the client’s home.

The provider can follow up with the employee, get more details, and provide client-specific information to ensure the best support.

GPS Location

Reasons GPS **may not** match the address on file for the client:

- The services were performed in the community.
- The client's address has not been updated.
- Sandata uses Google Maps for client location and the Google property pin may be set inaccurately.
- There may be an issue with the smart phone being used or the smart phone settings.
- There may be an issue with a building or hill that may make GPS inaccurate.

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Reasons GPS **may not** match the address on file for the client:

- The services were performed in the community.
- The client's address has not been updated.
- Sandata uses Google Maps for client location and the Google property pin may be set inaccurately.
- There may be an issue with the smart phone being used or the smart phone settings.
- There may be an issue with a building or hill that may make GPS inaccurate.

GPS Location

Providers can monitor GPS exceptions using the **GPS Distance Exception** report.

GPS Distance Exception

ACCOUNT: Training Account 4 (91102)
PAYER: CAREWIFCP
PROGRAM: WIMCO

| CLIENT ID | CLIENT NAME | CLIENT MEDICAID ID | EMPLOYEE ID | EMPLOYEE NAME | EMPLOYEE EMAIL | ACTUAL CALL DATE | ACTUAL CALL TIME | SERVICE | DISTANCE (FT) | CLOSEST CLIENT ADDRESS |
|-----------|-------------|--------------------|-------------|------------------|------------------------|------------------|------------------|---------|---------------|---------------------------------------|
| 890163 | | 1112221024 | 100006123 | Andrews, Alfreda | alfredaa@malinator.com | 10/22/2021 | 10:09 PM | T1020 | 1405700 | 2117 HUEBBE PKWY,Beloit,WI,53511-0000 |
| 890163 | | 1112221024 | 100006123 | Andrews, Alfreda | alfredaa@malinator.com | 10/22/2021 | 10:01 PM | T1020 | 1405700 | 2117 HUEBBE PKWY,Beloit,WI,53511-0000 |

There is a report that summarizes GPS information, if providers would like to use it.

Resources

Now let's talk about additional resources that are available.

Resources

- EVV Customer Care
 - Phone: 833-931-2035, Monday–Friday, 7 a.m.-6 p.m.
 - Email: VDXC.ContactEVV@wisconsin.gov
- EVV webpage: www.dhs.wisconsin.gov/evv/index.htm
 - Training resources
 - Information about EVV in Wisconsin

Thank You

Thank you for the important services you provide to clients.



WISCONSIN DEPARTMENT
of HEALTH SERVICES