

# Electronic Visit Verification: Visit Maintenance

# 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.

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# Key Terminology

- Call—A check in or out of a visit using *any* EVV method
- 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 (worker)
- Exception —Missing information or errors in the Sandata EVV portal

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

- Call—A check in or out of a visit through *any* EVV method. 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. A "client" in the Sandata EVV system is frequently called a "member" or "participant" in Wisconsin's service delivery.
- Dashboard—Real-time status of the current day's visit exceptions
- Employee—A person who provides care to one or more clients (worker)
- Exception —Missing information or errors in the Sandata EVV portal

# Key Terminology

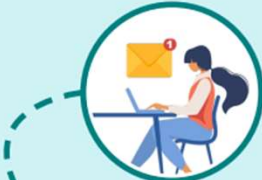
- FVV—Fixed visit verification
- Sandata EVV portal—Administrative tool for reviewing and editing worker visits
- Santrax ID—The employee/worker ID number, originating on the ForwardHealth Portal, that identifies them in Sandata.
- SMC—Sandata Mobile Connect app
- TVV—Telephonic visit verification
- Visit—An in-person service to a client in a home or community-based setting

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- FVV—Fixed visit verification
- Sandata EVV portal—Administrative tool for reviewing and editing worker visits. This is done on a tablet, laptop, or desktop computer.
- Santrax ID—The employee/worker ID number that originates on the ForwardHealth Portal. Employees use this number to identify themselves when using Sandata’s TVV and FVV.
- SMC—Sandata Mobile Connect app, used by workers on a smartphone or tablet
- TVV—Telephonic visit verification
- Visit—An in-person service to a client in a home or community-based setting

# EVV Visit Lifecycle

# EVV Visit Lifecycle



**Authorization**

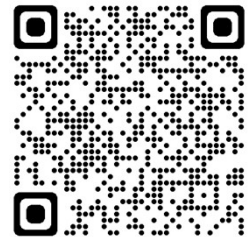
Payer authorizations are submitted to the Wisconsin Department of Health Services (DHS). DHS sends all authorizations for services requiring EVV to Sandata nightly.



## Visit

A worker uses EVV technology to check in and check out of an authorized visit. Six key data points are captured to create EVV visit data.

[www.dhs.wisconsin.gov/publications/p03124.pdf](http://www.dhs.wisconsin.gov/publications/p03124.pdf)



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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.

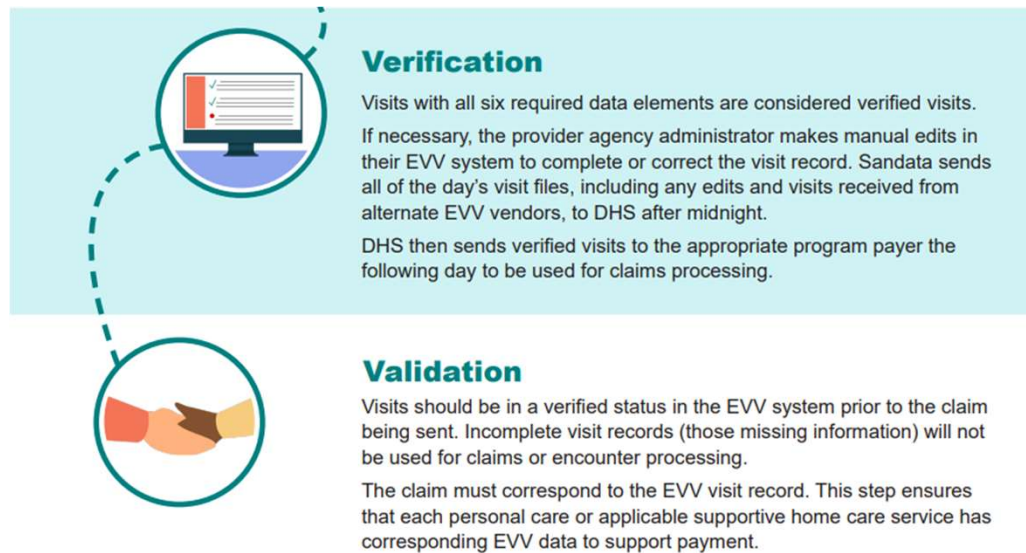
Next is the visit. Employees use EVV technology to check in and check out of a visit. The information gathered should reflect to the authorization: the correct services, provided to the correct client, by the correct provider (and their employee), within the timeframe outlined.

Invest in training employees! An employee who knows how to use EVV during the



visit is an important part of this path and 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

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:

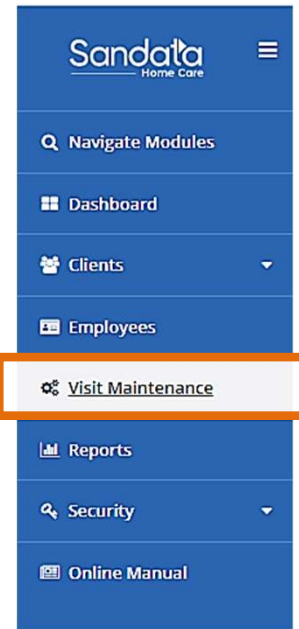
- EVV does not change the process of how claims are submitted. Claims are done the same as usual, outside EVV.
- EVV does not change documentation retention requirements.
- EVV does not change the need for physician orders, a plan of care, or other required documentation.
- EVV does not change timely 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.

# Visit Maintenance Basics

# 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.



# 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 information.

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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:

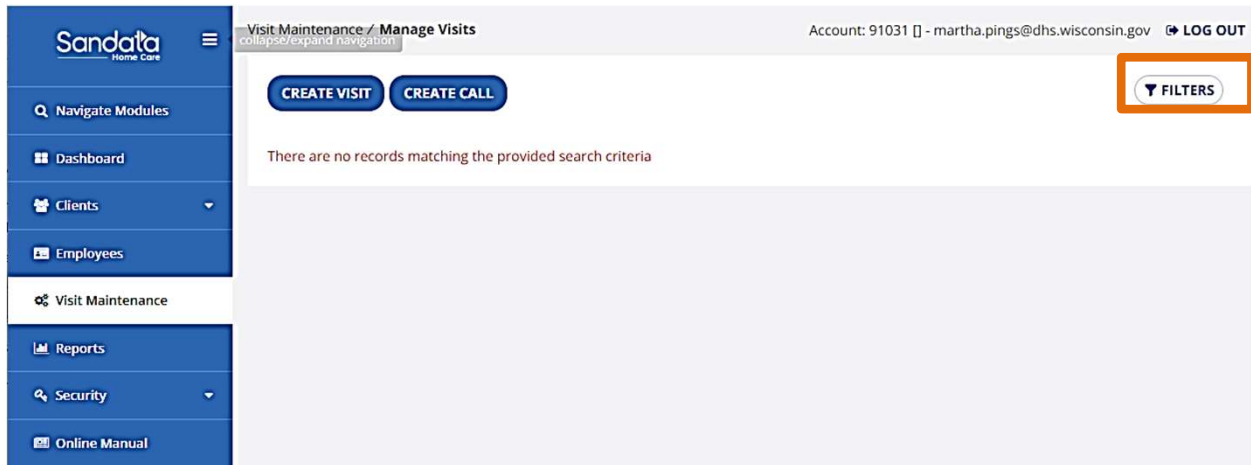
System Admin

Coordinator

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

# Search Filters

Use the “Filters” option to view visits.



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When you first click on Visit Maintenance, you will see three options across the top: Create Visit, Create Call, and Filters. It's best to start with Filters, so you can define the list of visits you'd like to see. The current default is all visits for today.



# Search Filters

Within the filter, select the information needed.

- Click the dates to view any range. The current date will populate by default.
- Click **Clear** to start over.
- Click **Save Settings** to set up new default settings.
- Click **Apply Filters** when you are ready to view.

The screenshot shows a 'Filters' panel with the following fields:

- From Date: 12/18/2024
- To Date: 12/18/2024
- Client: Enter Client
- Employee: Enter Employee
- Payer: Select Payer
- Program: Select Program
- Service: Select Service
- Category: Select Category
- Visit Status: Select Visit Status
- Client Medicaid ID: Enter Client Medicaid ID
- Filter Visits By: All Visits
- Exception Types: Select Exception Types
- Call Type: Select Call Type
- Employee Other ID: Enter Employee Other ID
- Supervisors: Select Supervisors
- Department: Select Department
- Group Visit Code: Select Group Visit Code
- Visit Key: Enter Visit Key

At the bottom, there are four buttons: 'CLEAR', 'RESET', 'APPLY FILTERS', and 'SAVE SETTINGS'. The 'APPLY FILTERS' and 'SAVE SETTINGS' buttons are highlighted with an orange border.

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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.

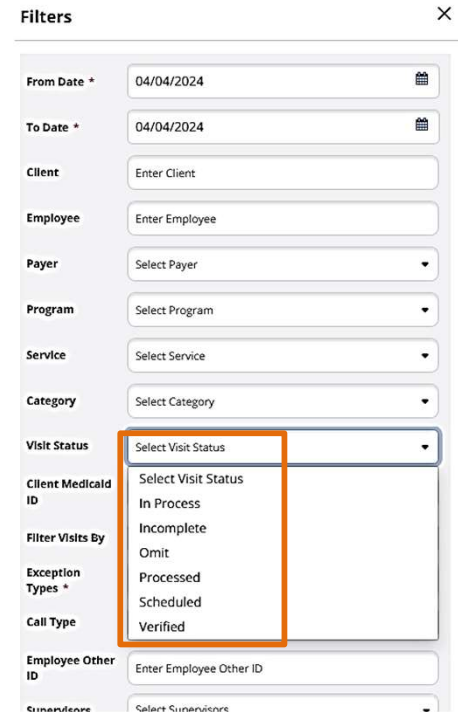
You can enter portions of a name if you are not sure of a spelling (for example, "Kell" if you are not sure if it's Kelly or Kelley).

If you'd like particular filter settings to always show, use the "Save Settings" button at the bottom right. "Reset" will clear any filter choices done after your saved settings. "Clear" will clear all filter choices, including any saved settings.

# Search Filters

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

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



The screenshot shows a 'Filters' dialog box with various search criteria. The 'Visit Status' dropdown is expanded, showing a list of status options. An orange box highlights the 'In Process' and 'Incomplete' options, which correspond to the bullet points in the text above.

Field	Value
From Date *	04/04/2024
To Date *	04/04/2024
Client	Enter Client
Employee	Enter Employee
Payer	Select Payer
Program	Select Program
Service	Select Service
Category	Select Category
Visit Status	Select Visit Status
Client Medicaid ID	Select Visit Status
Filter Visits By	In Process
Exception Types *	Incomplete
Call Type	Omit
Employee Other ID	Processed
Supervisors	Scheduled
Supervisors	Verified

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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

The screenshot shows a 'Filters' dialog box with various search criteria. The 'Visit Status' dropdown is expanded, revealing a list of status options. An orange rectangular box highlights the 'Omit' option in this list. Other visible filters include 'From Date', 'To Date', 'Client', 'Employee', 'Payer', 'Program', 'Service', 'Category', 'Client Medicaid ID', 'Filter Visits By', 'Exception Types', 'Call Type', 'Employee Other ID', and 'Supervisors'.

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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.

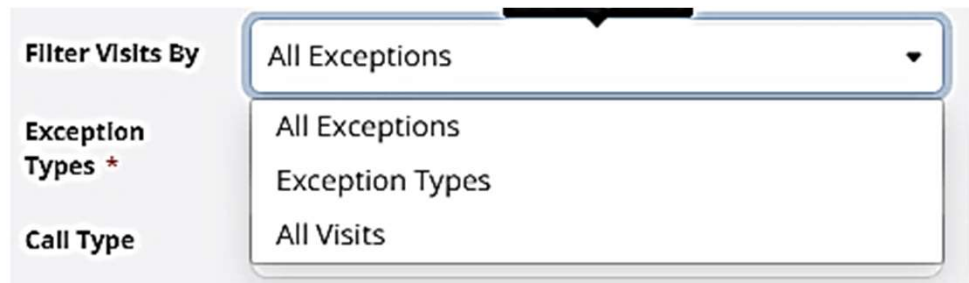
“Verified” will show all the visits that have all the data and require no further action.

“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

A screenshot of a web application's search filter interface. On the left, there is a vertical list of filter categories: 'Filter Visits By', 'Exception Types \*', and 'Call Type'. To the right of 'Filter Visits By' is a dropdown menu. The dropdown is currently open, showing three options: 'All Exceptions', 'Exception Types', and 'All Visits'. The 'All Exceptions' option is highlighted at the top of the dropdown list. The dropdown menu has a light blue border and a small downward arrow on the right side of its header.

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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 Visits."

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 dates selected.
- Status results include verified, in process, omit, and incomplete.

Show Legend

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
Adams, John	PEMA, SHERPA	Personal Care Svc/15min	03/25/2024	12:36 PM	12:53 PM	00:17	12:36 PM	12:53 PM		Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
Itzen, Sheila	PEMA, SHERPA	Private Duty Nursing - RN/Hour	03/25/2024	12:57 PM			12:57 PM			Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
(516)484-4400			03/08/2024	05:50 AM			05:50 AM			Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
TEST, VOID	Caregiver, Sheila		02/26/2024	10:00 AM	01:00 PM	03:00	10:00 AM	01:00 PM		Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
Total: 03:17													

25 of 4 entries

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If you filter visits by All Visits, you will see a list of visits like this. Each row is a different visit. You can see the information that is summarized across each row.

- All visits are displayed within the dates selected.
- 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 date range.

The screenshot shows a 'Filters' panel with the following fields:

- From Date: 02/26/2024
- To Date: 04/05/2024
- Client: Enter Client
- Employee: Enter Employee
- Payer: Select Payer
- Program: Select Program
- Service: Select Service
- Category: Select Category
- Visit Status: Select Visit Status
- Client Medicaid ID: Enter Client Medicaid ID
- Filter Visits By: All Exceptions (highlighted)
- Exception Types: All Exception Types
- Call Type: All Visits
- Employee Other ID: Enter Employee Other ID
- Supervisors: Select Supervisors
- Department: Select Department
- Group Visit Code: Enter Group Visit Code

Buttons: CLEAR, APPLY FILTERS

If you filter visits by All Exceptions

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

TIP: Using an "All Exceptions" filter is a good way to see what visits have exceptions that need to be fixed.

# Search Filters

## Filter Visits by Exception Types

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

The screenshot shows a 'Filter Visits By' section with three filter categories: 'Exception Types \*', 'Call Type', and 'Exception Types'. The 'Exception Types' dropdown menu is open, showing three options: 'All Exceptions', 'Exception Types', and 'All Visits'. An orange arrow points from the 'Exception Types' option to a detailed list of exception types. This list includes a 'Select All' checkbox, a 'Search' field, and several unchecked checkboxes: 'Missing Service', 'Unauthorized Service', 'Unknown Clients', 'Unknown Employees', 'Unmatched Client ID / Phone', and 'Visits Without Any Calls'.

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What if you filter visits by Exception Types?

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

This is a great tool to view and work on visits with the same exception types.

# Search Filters

The search results include all data that matches the filters.

Show Legend

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
Adams, John	PEMA, SHERPA	Personal Care Svc/15min	03/25/2024	12:36 PM	12:53 PM	00:17	12:36 PM	12:53 PM		Incomplete	<input type="checkbox"/>		
Itzen, Sheila	PEMA, SHERPA	Private Duty Nursing - RN/Hour	03/25/2024	12:57 PM			12:57 PM			Incomplete	<input type="checkbox"/>		
(516)484-4400			03/08/2024	05:50 AM			05:50 AM			Incomplete	<input type="checkbox"/>		

Total: 00:17

25 ▼ of 3 entries

« < 1 > »

Once you've applied the filters you want, you will see a list of visits like this. Each row is a different visit. You can see the information that is summarized across each row.



# Display Options

To change what information is shown, click **Show Display Options**.

**SHOW DISPLAY OPTIONS**

<input checked="" type="checkbox"/> Adjusted Hours	<input type="checkbox"/> Employee Contact Phone Number	<input type="checkbox"/> Tasks
<input checked="" type="checkbox"/> Adjusted In	<input type="checkbox"/> Employee ID	<input checked="" type="checkbox"/> Units
<input checked="" type="checkbox"/> Adjusted Out	<input checked="" type="checkbox"/> Employee Name	<input checked="" type="checkbox"/> Visit Date
<input type="checkbox"/> Approved	<input type="checkbox"/> Employee Other ID	<input type="checkbox"/> Visit Key
<input checked="" type="checkbox"/> Call Hours	<input type="checkbox"/> Exported	<input checked="" type="checkbox"/> Visit Status
<input checked="" type="checkbox"/> Call In	<input type="checkbox"/> Group Visit Code	
<input checked="" type="checkbox"/> Call Out	<input type="checkbox"/> In/ Out Call Location	
<input type="checkbox"/> Claims Verification Status	<input type="checkbox"/> Memo	
<input type="checkbox"/> Client ID	<input type="checkbox"/> Offline Visit	
<input type="checkbox"/> Client Medicaid ID	<input type="checkbox"/> Payer	
<input checked="" type="checkbox"/> Client Name	<input type="checkbox"/> Program	
<input type="checkbox"/> Client Primary Phone Number	<input type="checkbox"/> Santrax ID	
<input type="checkbox"/> Client Verified	<input checked="" type="checkbox"/> Service	
<input checked="" type="checkbox"/> Do Not Bill	<input type="checkbox"/> Supervisor	

RESET SAVE

Once you have the list of visits you want to view, you can also change what information about each visit will show in the columns.

To change the display options, select Show Display Options. Check the information you want and click Save.

As a reminder, the DHS-provided Sandata system does not include billing and claims processing. Selecting those items from this list will not give information in those fields.

# Display Options

To export information, click **Export Data**.

The screenshot shows the Sandata EVV portal interface. At the top, there are three buttons: 'FILTERS', 'SHOW DISPLAY OPTIONS', and 'EXPORT DATA'. An orange arrow points to the 'EXPORT DATA' button. Below the buttons is a table with the following columns: CLIENT NAME, EMPLOYEE NAME, SERVICE, VISIT DATE, and IN/ OUT CALL LOCATION. The table contains three rows of data. An orange arrow points from the table to an Excel spreadsheet on the right. The Excel spreadsheet shows the data exported from the table, with columns for Client Name, Employee Name, Service, Visit Date, In/ Out Call In, Call Out, Call Hours Adjusted, and Adjusted. The Excel spreadsheet is titled 'Table1' and shows data for three rows.

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	IN/ OUT CALL LOCATION
	Caregiver, Amber	Private Duty Nursing - RN/Hour	05/28/2024	Home /
	Caregiver, Amber	Personal Care/Day	05/28/2024	/
Adams, John	Caregiver, Chris	Supportive Home Care/Day	05/23/2024	Community / Community

Excel Spreadsheet Data:

Client Name	Employee Name	Service	Visit Date	In/ Out Call In	Call Out	Call Hours Adjusted	Adjusted
	Caregiver, Amber	Private Duty Nursing - RN/Hour	05/28/2024	01:00 PM	09:35 AM	01:00 PM	09:35 AM
	Caregiver, Amber	Personal Care/Day	05/28/2024	04:01 PM	04:01 PM	04:01 PM	04:01 PM

Did you find visit information you'd like to share with others on your team, or information you want to sort and summarize? Select Export Data and choose either a CSV or Excel file. An Excel example is shown here.

This feature is in addition to the ready-to-run reports that are available in the Sandata EVV portal. (See the Reports training items for more information on Sandata's reports.)

# Identifying Exceptions

Visit exceptions are indicated by a red or orange dot. Other dot colors are not exceptions.

Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	IN/ OUT CALL LOCATION	CALL IN	CALL OUT
●	Caregiver, Amber	Private Duty Nursing - RN/Hour ●	05/28/2024	Home /	01:00 PM	
●	Caregiver, Amber	Personal Care/Day ●	05/28/2024	/	●	09:30 AM
Adams, John	Caregiver, Chris	Supportive Home Care/Day ●	05/23/2024 ●	Community / Community	08:00 AM	09:00 AM
McPherson,	●	●	05/23/2024		04:01 PM	●

Legend

Highlight colors

- Exception
- Multiple Client with the same phone
- Visit Created Manually
- Task(s) Exist for Visit
- FVV Device Indicator

Let's take a closer look at the list of visits. Each row is a different visit.

Visit exceptions are indicated by a red 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 unauthorized or missing
- Missing call in/call out

For information about what each color means, you can select "Show Legend" in the upper left corner.

Our example has one yellow dot, showing that this visit was created manually on the Sandata EVV portal. This is for awareness only—it is not an "exception." Only red and orange dots are exceptions that need attention.

# 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
	Y C		08/14/2017		2:47 PM				
	Y C		08/14/2017		2:46 PM				
	000-44-6258		08/14/2017						

**Exceptions:**  
Visits without in-calls

# 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. This will clear the exception and get the visit into a verified status.

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 clear the exception for that visit. Let’s take a look at some examples.

# Identifying Exceptions

Exception Setting	Description	Setting
Unknown Client (red dot)	A visit occurs where the client is not known to the Sandata system.	Fix
Unknown Employee (red dot)	The employee Santrax ID entered during a TVV or FVV call does not match to any known employee.	Fix
Unmatched Client Phone/ID (orange dot)	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 (red dot)	The service provided for the visit is not specified.	Fix
Visits Without In-Calls (red dot)	The visit does not have a call in. Check for visit to merge.	Fix
Visits Without Out-Calls (red dot)	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. A 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 (red dot)	The service entered during the check in or check out does not match the service shown in the authorization information, or there is no current authorization on file.	Fix

**NOTE:** GPS location is informational only and is not an exception.

Unauthorized service happens when the service entered doesn't match the authorization information that's on file in Sandata., or there is no current authorization on file.

NOTE: GPS location will be flagged within visit information on the Sandata EVV portal only 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 is listed apart from the chart above. DHS does not currently use GPS data to deny claims. Data may be used for compliance review by the Office of the Inspector General.



# Basic Steps: Exceptions

Select the exception dot.

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	CA HC
TESTCLIENT, FFSREGRESSION	Test, John	Unspecified Therapeutic Procedure - OT/Visit	02/21/2024	01:00 PM	03:00 PM	02:

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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. In this example, the service provided shows an exception, so we’ll click on that red dot. (Remember, the yellow dot means it was manually entered. That does not need correction.)

# Basic Steps: Exceptions

Enter the corrections.

← BACK Visit From Date: 02/21/2024

Client ID#: 898700 | Client Name: TESTCLIENT, FFSREGRESSION | Medicaid ID#: 222112221 | Employee ID#: 850215 | Employee Name: Test, John

General Client Employee Call Log Tasks Exceptions GPS Memo Claims History

Visit From Date 02/21/2024	Visit To Date 02/21/2024	Visit Time Zone US/Central	Visit Status Incomplete
Call In 01:00 PM	Call Out 03:00 PM	Call Hours 02:00	
Adjusted In Date 02/21/2024	Adjusted In 01:00 PM	Adjusted Out Date 02/21/2024	Adjusted Out 03:00 PM
Agency ID 91031	Agency Name MOM HOME HEALTH AND PC - CROP	Service Unspecified Therapeutic Procedure - OT/...	Group Visit Code
Payer WIFS	Program FFS	Client Signature No	Offline Visit N/A
Client Verified Time No	Client Verified Service No		
Visit Source UAT VendorTest			
Do Not Bill	Approved	GENERATE GROUP VISIT CODE	

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A new screen will open with the full details of the visit

CORRECT: Enter in the corrections. Since "Service" had the exception dot, we'll look at the "Service" field here and correct it using the drop-down menu.

# Basic Steps: Exceptions

Enter the **Reason Code** and **Resolution Code**. **Save**.

The form contains the following fields and controls:

- Payer:** WIFFS (dropdown)
- Program:** FFS (dropdown)
- Service:** Personal Care Svc/15min (dropdown)
- Group Visit Code:** (text field)
- Client Verified Time:** No (text field)
- Client Verified Service:** No (text field)
- Client Signature:** No (text field)
- Offline Visit:** N/A (text field)
- Visit Source:** UAT VendorTest (text field)
- Do Not Bill:** (checkbox, currently unchecked)
- Approved:** (checkbox, currently checked)
- GENERATE GROUP VISIT CODE:** (button)
- Reason Code \*:** Select Reason Code (dropdown)
- Resolution Code \*:** Select Resolution Code (dropdown)
- Reason Note:** Enter Reason Note (text field)
- SAVE:** (button)

\* indicates required field

Reason Code is required.

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In this example, we changed the service from Unspecified Therapeutic Procedure to Personal Care Svc/15 min, and made sure the program and payer fields were also correct on the top line.

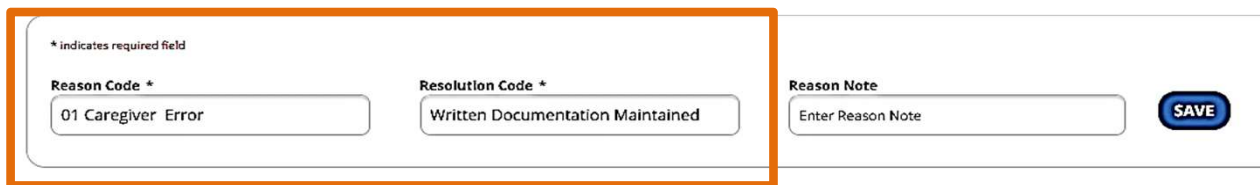
Finally, enter in the required fields at the bottom, Reason Code and Resolution Code.

Save.

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

# 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.



The screenshot shows a form with three main sections. The first section, labeled 'Reason Code \*', contains a dropdown menu with '01 Caregiver Error' selected. The second section, labeled 'Resolution Code \*', contains a dropdown menu with 'Written Documentation Maintained' selected. The third section, labeled 'Reason Note', contains a text input field with the placeholder 'Enter Reason Note'. A blue 'SAVE' button is located to the right of the Reason Note field. An orange box highlights the Reason Code and Resolution Code sections. A small asterisk icon with the text '\* indicates required field' is located at the top left of the form.

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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 authorizations (wherever the providers maintain the evidence for what they are billing. Make sure you have this documentation.

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 reviewed by the Office of the Inspector General as they 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

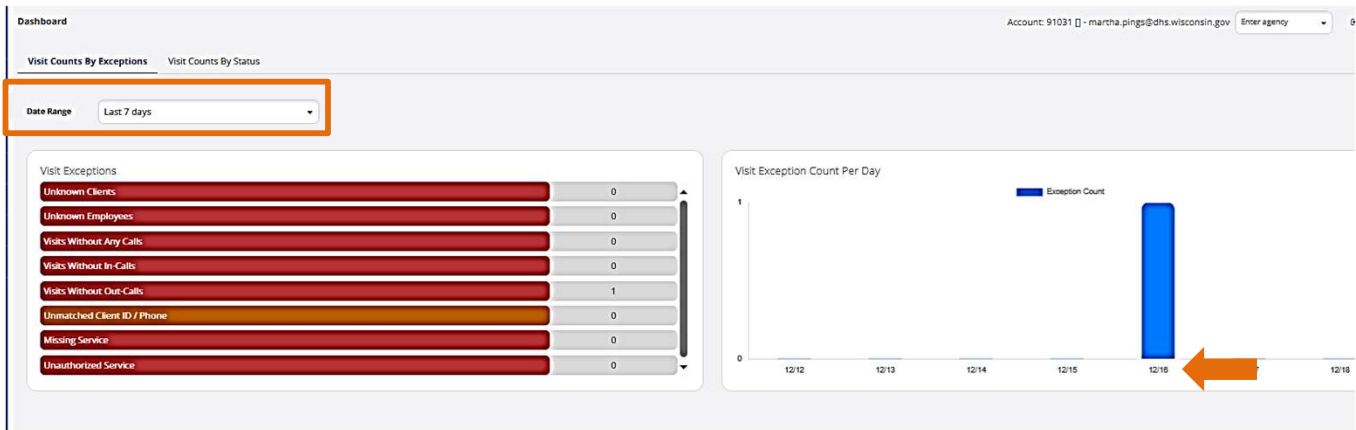
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The table here shows the list of drop-down reason codes.

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.

# Sandata EVV Portal Dashboard

# Sandata EVV Portal Dashboard



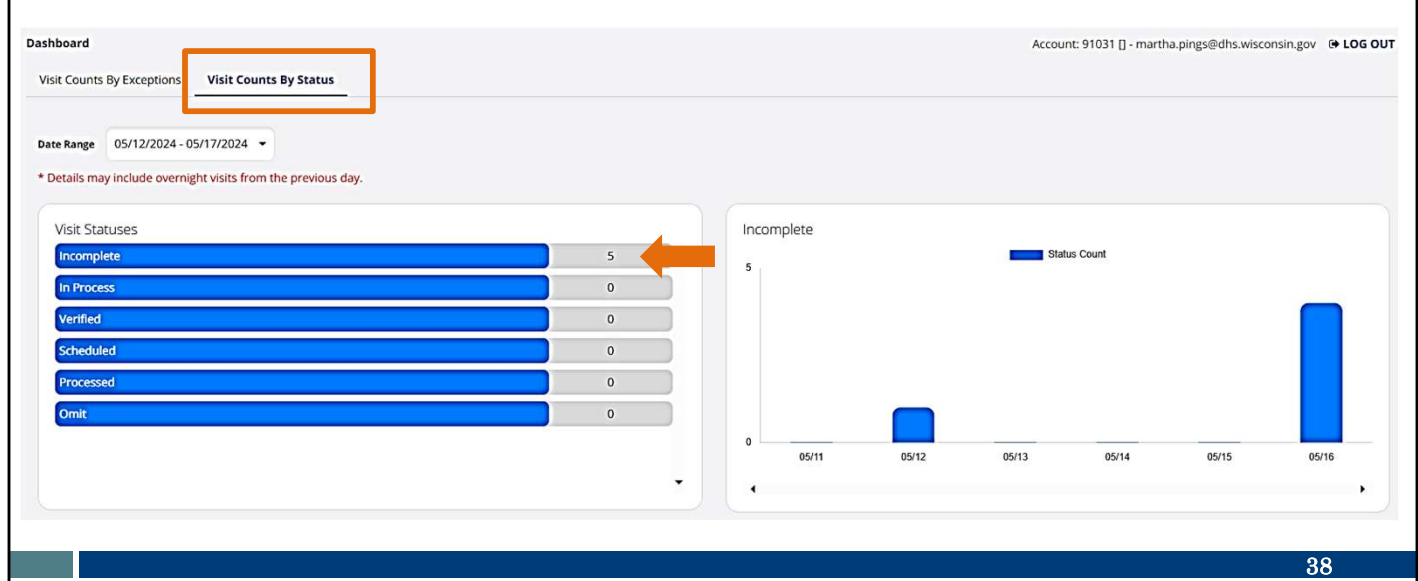
37

The Sandata EVV portal dashboard is the first screen that appears when a user logs in. This is a real-time "today only" snapshot. However, it can be changed to a date range to the last 7 days using the drop-down arrow shown here.

All the different types of exceptions are noted on the dashboard. These will also appear in visit maintenance lists, of course, but this quick view can help providers quickly identify how many exceptions occurred within one day or up to a seven-day range. You can see trends and start to problem solve to prevent future exceptions right away.

In our example here, we have the last 7 days' view. The chart on the right shows one exception on 12/16.

# Sandata EVV Portal Dashboard



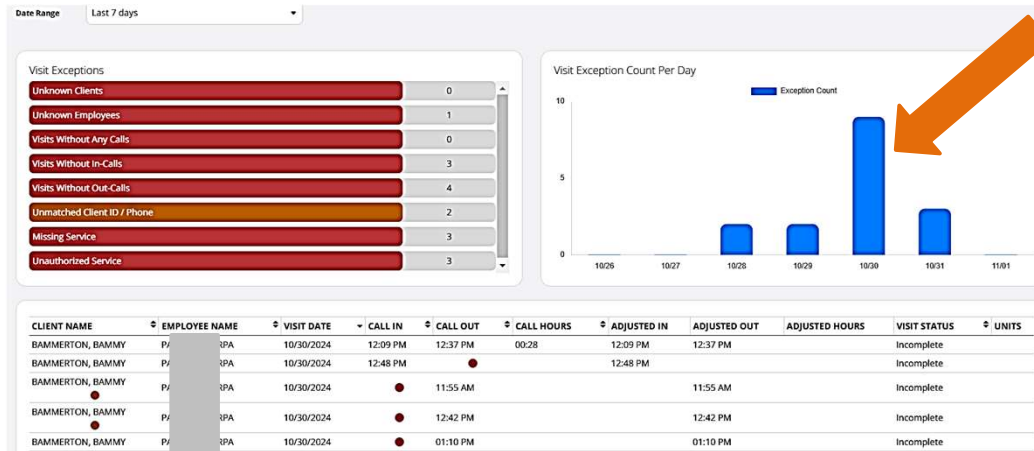
You can also choose the Visit Counts By Status tab at the top. After you choose a date range within the calendar month, the blue Visit Status bar will show how many visits are in each status. Click on a blue bar on the left, and you'll see a date summary on the right side of the screen. Here we've chosen the Visit Status of "Incomplete," and can see one visit from May 12 and four visits from May 16 are incomplete.

This is another way to quickly see trends.



# Sandata EVV Portal Dashboard

Clicking a blue bar in the Visit Exception Count Per Day chart allows the user to view visits with exceptions on that day.



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Click a blue bar in the Visit Exception Count Per Day chart. It will list the visits with exceptions for that day, as shown on the bottom part of this screenshot.

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

# 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 (offline) without the client information entered.
- 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:

- A employee may start an offline SMC visit as an "Unknown Visit" but did not enter the client's name and Sandata ID.
- 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. This is covered separately in the "Adding 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 3 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	Call Hours	Adjusted In
	Caregiver, Sheila	Supportive Home Care/Day	05/14/2024	01:50 PM			01:50 PM

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

# Unknown Client Exception

- Click **Filters**.
- Add details to narrow the search.
- Click **Apply Filters**.

The screenshot displays the 'Find Client' interface. On the left, there is a table titled 'Client Contact Information' with columns for Address Type, County, SSN, Email Address, Time Zone, Address Line 1, State, Gender, Address Line 2, Zip Code, Language Preference, City, and Supervisor. Below the table is a 'Find Client' section with a search bar and a 'FILTERS' button. An orange arrow labeled '1' points to the 'FILTERS' button. To the right, a 'Filters' modal is open, showing input fields for Client First Name, Client Last Name, Client Medicaid ID, and Client ID. There is also a toggle for 'Include Inactive Clients'. An orange arrow labeled '2' points to the 'APPLY FILTERS' button at the bottom right of the modal. A 'CLEAR' button is also visible.

Client Contact Information							
Address Type	None	Address Line 1	None	Address Line 2	None	City	None
County	None	State	None	Zip Code	None		
SSN	None						
Email Address	None	Gender	None	Language Preference	None	Supervisor	None
Time Zone	None						

Find Client

1 → FILTERS

Filters

Client First Name: Enter Client First Name

Client Last Name: Enter Client Last Name

Client Medicaid ID: Enter Client Medicaid ID

Client ID: Enter Client ID

Include Inactive Clients: ☐

CLEAR 2 → APPLY FILTERS

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

First, in the find Client section, click Filters (see the #1 arrow), to open the Filter options. Then add data to help narrow your search and click Apply Filters.

# Unknown Client Exception

Click the action button for the correct client.

CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	ACTIONS
634976	Client, Test	333333330	<input type="radio"/>
151036	Client, Test A	5555511111	<input checked="" type="radio"/>
850161	Client, Testtwo	333333331	<input type="radio"/>
507140	CLIENTONE, TESTCLIENT	2347755600	<input type="radio"/>
146910	CLIENTTHREE, TESTCLIENT	2347755602	<input type="radio"/>
633699	CLIENTTWO, TESTCLIENT	2347755601	<input type="radio"/>
730690	MRBFive, Test	9954813499	<input type="radio"/>
606172	MRBFour, Test	9918039599	<input type="radio"/>
967495	MRBOne, Test	9900082899	<input type="radio"/>
109772	MRBThree, Test	9911347699	<input type="radio"/>

10 of 12 entries

< 1 2 >

\* indicates required field

Reason Code \*

Select Reason Code

Resolution Code \*

Select Resolution Code

Reason Note

Enter Reason Note

SAVE

Reason Code is required.

Select the correct client by clicking the action button on their row.

# Unknown Client Exception

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

CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	ACTIONS
634976	Client, Test	333333330	<input type="radio"/>
151036	Client, Test A	555551111	<input checked="" type="radio"/>
850161	Client, Testtwo	333333331	<input type="radio"/>
507140	CLIENTONE, TESTCLIENT	2347755600	<input type="radio"/>
146910	CLIENTTHREE, TESTCLIENT	2347755602	<input type="radio"/>
633699	CLIENTTWO, TESTCLIENT	2347755601	<input type="radio"/>
730690	MRBFive, Test	9954813499	<input type="radio"/>
606172	MRBFour, Test	9918039599	<input type="radio"/>
967495	MRBOne, Test	9900082899	<input type="radio"/>
109772	MRBThree, Test	9911347699	<input type="radio"/>

10 of 12 entries

< 1 2 >

Reason Code \*  
  
Reason Code is required.

Resolution Code \*

Reason Note



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:  
[www.dhs.wisconsin.gov/library/collection/p-02844](http://www.dhs.wisconsin.gov/library/collection/p-02844)
- 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

# 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
(51 [REDACTED])0			03/08/2024	05:50 AM	

We're going to select and then correct—so, selecting the dot under the Employee Name column.

# Unknown Employee Exception

- Click **Filter** to open the options to search for an employee.
- Add employee information to narrow search results.
- Click **Apply Filters**.

The screenshot shows the 'Find Employee' section of a web application. At the top, there is an 'Employee Info Section' with a table of fields: Santrax ID, Address Line 1, Zip Code, Provider ID, Primary Phone Number, Address Line 2, Termination Date, Employee Other ID, Discipline, City, State, and None. Below this is the 'Find Employee' section with the text 'No search performed yet'. A modal window titled 'Filters' is open, containing input fields for 'Employee First Name', 'Employee Last Name', 'Employee ID', and 'Santrax ID #', along with a checkbox for 'Include Inactive Employees'. At the bottom of the modal are 'CLEAR' and 'APPLY FILTERS' buttons. An orange arrow labeled '1' points to the 'FILTERS' button in the top right corner. Another orange arrow labeled '2' points to the 'APPLY FILTERS' button at the bottom of the modal.


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

First, in the Find Employee section, click Filter (see arrow #1) to open the filter options to narrow the search for an employee. Enter as much or as little information as you'd like. You can leave some fields blank.  
Second, click Apply Filters.

# Unknown Employee Exception

- Select the employee Action button
- Select a reason code from the drop-down list.
- Select the resolution code, Written Documentation Maintained.
- Click Save.

EMPLOYEE ID	EMPLOYEE NAME	SANTRAX ID	ACTIONS
850215	Test, John	000850215	


  

\* indicates required field

**Reason Code \***  
  
Reason Code is required.

**Resolution Code \***

**Reason Note**

 **SAVE**

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Select the employee by clicking their Action button.

Then 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.

Is the employee missing from the list? Check what you entered in the filter and try again.

Reminder: Whenever a new hire is made, providers should enter that employee in the ForwardHealth Portal. The employee information from ForwardHealth is added the next day to this Sandata EVV portal. If an employee was not added in ForwardHealth, their information will not be here in the Sandata EVV portal.

# 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: [www.dhs.wisconsin.gov/library/collection/p-02844](http://www.dhs.wisconsin.gov/library/collection/p-02844)
- 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



# Missing Service Exception

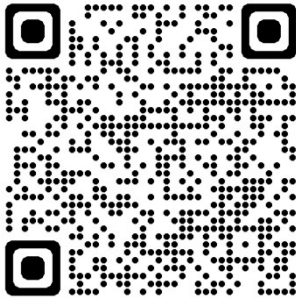
- The Missing Service exception shows when an incorrect service is chosen for the client.
- This type of exception must be fixed for the visit to be in a verified status.

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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](http://www.dhs.wisconsin.gov/evv/service-codes.htm)

Service Code	SMC Service Code	TVV Service Code #
<b>Personal Care and Supportive Home Care Services</b>		
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
<b>Home Health Care Therapy Services</b>		
92507	Speech Therapy Individual/Visit	35
97139	Unspecified Therapeutic Procedure-OT/Visit	40
97799	Unspecified Rehab Svc-PT/Visit	45
<b>Home Health Care Nursing Services</b>		
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, the portion of the Worker Visit Card shown here lists 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.

PCSO 177 - Active Hours														
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	
	Caregiver, Martha	PCS Nurse Supervisory Visit/Visit	05/10/2024	11:05 AM	11:34 AM	00:29	11:05 AM	11:34 AM		Incomplete	<input type="checkbox"/>	<input type="checkbox"/>		

As usual, we'll select the exception by clicking on it.

# 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.

The screenshot shows a web-based form for a 'Missing Service Exception'. At the top, there is a header with client and employee information: 'Client ID#: 911204 | Client Name: TEST, VOID | Medicaid ID#: 888442222 | Employee ID#: 745235 | Employee Name: Caregiver, Sheila'. Below this is a navigation bar with tabs: 'General', 'Client', 'Employee', 'Call Log', 'Tasks', 'Exceptions', 'GPS', 'Memo', 'Claims', and 'History'. The 'General' tab is active. The form contains several input fields for visit details: 'Visit From Date' (02/26/2024), 'Visit To Date' (02/26/2024), 'Visit Time Zone' (US Central), and 'Visit Status' (Incomplete). There are also fields for 'Call In' (10:00 AM), 'Call Out' (01:00 PM), 'Call Hours' (03:00), 'Adjusted In Date' (02/26/2024), 'Adjusted In' (10:00 AM), 'Adjusted Out Date' (02/26/2024), and 'Adjusted Out' (01:00 PM). A red rectangular box highlights the 'Payer' (Select Payer), 'Program' (Select Program), and 'Service' (Personal Care Svc/15min) fields. Below these are fields for 'Agency ID' (91031), 'Agency Name' (MOM HOME HEALTH AND PC - CBOP), 'Client Verified Time' (No), 'Client Verified Service' (No), 'Client Signature' (No), 'Offline Visit' (N/A), 'Visit Source' (UAT VendorTest), and 'Do Not Bill' (No). At the bottom right, there is a button labeled 'GENERATE GROUP VISIT CODE'.

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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.

**Important tip:** The service, payer, and program must all match the authorization on file in Sandata.

# 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**.

EMPLOYEE ID	EMPLOYEE NAME	SANTRAX ID	ACTIONS
850215	Test, John	000850215	<input type="radio"/>


  

\* indicates required field

**Reason Code \***  
  
Reason Code is required.

**Resolution Code \***

**Reason Note**



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

- 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.

# 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: [www.dhs.wisconsin.gov/library/collection/p-02844](http://www.dhs.wisconsin.gov/library/collection/p-02844)

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

# Unauthorized Service Exception

The unauthorized service exception can occur when:

- The employee started a visit for an unknown client (offline) without the client information entered.
- The employee chose the wrong service on SMC, TVV, or FVV.
- 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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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 visit for an unknown client (offline) without the client information entered.
- The employee chose the wrong service on SMC, TVV, or FVV.
- 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. The system isn't able to know which to choose.



# Unauthorized Service Exception

Click the exception dot under the Service column.

Show Legend														
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	
TEST, VOID	Caregiver, Sheila	Personal Care Svc/15min	02/26/2024	10:00 AM	01:00 PM	03:00	10:00 AM	01:00 PM		Incomplete	<input type="checkbox"/>	<input type="checkbox"/>		
TESTCLIENT, FFSREGRESSION	Test, John	Unspecified Therapeutic Procedure - OT/Visit	02/21/2024	01:00 PM	03:00 PM	02:00	01:00 PM	03:00 PM		Incomplete	<input type="checkbox"/>	<input type="checkbox"/>		
Total: 05:00														

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First, you select by clicking on the red exception dot. (The yellow dot, according to Sandata's legend in upper left corner, means it was manually entered. This is not an exception needing to be corrected.)

# Unauthorized Service Exception

- Select the **General** tab.
- 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.

Client ID# 911 34 | Client Name: TEST\_VOID | Medicaid ID# 8884442222 | Employee ID# 745235 | Employee Name: Carogven, Sheila

**General** | Client | Employee | Call Log | Tasks | Exceptions | GPS | Memo | Claims | History

Visit From Date: 02/26/2024 | Visit To Date: 02/26/2024 | Visit Time Zone: US/Central | Visit Status: Incomplete

Call In: 10:00 AM | Call Out: 01:00 PM | Call Hours: 03:00

Adjusted In Date: 02/26/2024 | Adjusted In: 10:00 AM | Adjusted Out Date: 02/26/2024 | Adjusted Out: 01:00 PM

Agency ID: 91031 | Agency Name: MOM HOME HEALTH AND PC - CROP

Payer: WBPB | Program: FIS | Service: Personal Care Svc/15min

Group Visit Code: | Offline Visit: N/A

Do Not Bill: [X] Approved: [X]

Reason Code: [Select Reason Code] | Resolution Code: [Select Resolution Code] | Reason Note: [Enter Reason Note] | Save

Now you correct.

Make sure you're in the "General" tab from the options at the top.

- 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.

**Important Tip: The service, program and payer must match what is on file for the authorization.**

# Unauthorized Service Exception

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

Payer: WIFFS, Program: FFS, Service: Personal Care Svc/15min, Group Visit Code: [empty]

Client Verified Time: No, Client Verified Service: No, Client Signature: No, Offline Visit: N/A

Visit Source: UAT VendorTest

Do Not Bill: [toggle], Approved: [toggle]

GENERATE GROUP VISIT CODE

\* indicates required field

Reason Code \*: Select Reason Code, Resolution Code \*: Select Resolution Code

Reason Note: Enter Reason Note

SAVE

Reason Code is required.

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

- 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.

# 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.
- Ensure employees have the correct two-digit code for the service to use when entering a visit through TVV or FVV.
- Provide employees with a Worker Visit Card for each client:  
[www.dhs.wisconsin.gov/library/collection/p-02844](http://www.dhs.wisconsin.gov/library/collection/p-02844).

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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.
- Ensure employees have the correct two-digit code for the service to use when entering a visit through TVV or FVV.
- Provide employees with a Worker Visit Card for each client. Highlight the service to select, and the two-digit code for that service if using 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. Refer to the "Adding Required Authorization Information in the Sandata EVV Portal" presentation, [www.dhs.wisconsin.gov/publications/p03550.pdf](http://www.dhs.wisconsin.gov/publications/p03550.pdf).

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DHS sends authorizations to the Sandata system. If approved authorization is not loaded to Sandata in 3 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 "Adding Required Authorization Information in the Sandata EVV Portal" presentation, linked here. Entering in the required information will prevent an unauthorized service exception.

# Correcting Unmatched Client ID/ Phone Exceptions

# Unmatched Client ID/Phone

- 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.



# Unmatched Client ID/Phone

Click the exception dot under the Client Name column.

Show Legend													
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
Full, Wonder 	Caregiver, Sheila	Speech Therapy - Individual/Visit	09/07/2023	03:53 PM	04:03 PM	00:10	03:53 PM	04:03 PM		Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	

As with other exception dots, we'll click on it to select it.

# Unmatched Client ID/Phone

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. This is the only exception that is not fixed—it is acknowledged. Check the box that says "Acknowledge this exception." 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.

# Unmatched Client ID/Phone

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

The screenshot shows a web form with the following fields and controls:

- Payer:** Dropdown menu with 'WIFFS' selected.
- Program:** Dropdown menu with 'FFS' selected.
- Service:** Dropdown menu with 'Personal Care Svc/15min' selected. This field is highlighted with an orange box.
- Group Visit Code:** Empty text input field.
- Client Verified Time:** Text input field with 'No' entered.
- Client Verified Service:** Text input field with 'No' entered.
- Client Signature:** Text input field with 'No' entered.
- Offline Visit:** Text input field with 'N/A' entered.
- Visit Source:** Text input field with 'UAT VendorTest' entered.
- Do Not Bill:** Toggle switch, currently off.
- Approved:** Toggle switch, currently off.
- GENERATE GROUP VISIT CODE:** Blue button.
- Reason Code \*:** Dropdown menu with 'Select Reason Code' selected. This field is highlighted with an orange box.
- Resolution Code \*:** Dropdown menu with 'Select Resolution Code' selected. This field is highlighted with an orange box.
- Reason Note:** Text input field with 'Enter Reason Note' placeholder.
- SAVE:** Blue button, indicated by an orange arrow from the Reason Note field.

\* Indicates required field

Reason Code is required.

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

- 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.

For your information, you can see the phone number used for the visit in the Call Log screen.

# Unmatched Client ID/Phone

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 ID/Phone

- 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 ID/Phone

- 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](http://www.dhs.wisconsin.gov/forms/f02404.docx))
  - Contact their IRIS Consultant Agency.
  - 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 ID/Phone

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

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

[www.dhs.wisconsin.gov/evv/training-administrators.htm](http://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 landline phone number to the Sandata client file to prevent this exception. This will not update any other systems.

Refer to the Client Data Entry 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](http://www.dhs.wisconsin.gov/evv/training-administrators.htm)

## Correcting a Missing Call In or Call Out Exception



# Visit Without Check In/Check Out

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

- Sandata refers to “call in” and “call out” for all methods: SMC, TVV, FVV, or manually entered.
- 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. Don’t let the word “call” limit your thinking. Sandata refers to “call in” and “call out” for all methods: SMC, TVV, FVV, or visits that are manually entered on the Sandata EVV portal.

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.

We’ll go over each of these options.

# 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

# Merging Calls

The **Merge Calls** option 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 correcting some exceptions.

The Merge Calls option 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

Let's go through an example.

# Merging Calls

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	VISIT STATUS	DO NOT BILL
Jackson, Cedrick	So [REDACTED] ni	Speech Therapy - Individual/Visit	09/28/2023	●	03:15 PM	Incomplete	<input type="checkbox"/>
Jackson, Cedrick	So [REDACTED] ni	●	09/28/2023	12:57 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	02:31 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	02:32 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	02:33 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	02:33 PM	●	Incomplete	<input type="checkbox"/>
Jackson, Cedrick	So [REDACTED] ni	●	09/28/2023	02:34 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	03:11 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	03:14 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	03:19 PM	●	Incomplete	<input type="checkbox"/>

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Here we have several incomplete visits. They were all made in a short timeframe—the afternoon of September 28. Some are missing a call in, and some are missing a call out. Can any of these be merged? Let's find out.

Since the top row has the most information, we'll start there.

As usual, select (click on) the row to open the Visit Details screen for edits. We'll be looking to combine the 2:34 p.m. "Call In" line to go with the 3:15 p.m. "Call Out" time.

# Merging Calls

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

Visit Maintenance / **Visit Details**

< BACK Visit From Date: 09/28/2023

Client ID: 695459 | Client Name: Jackson, Cedrick | Medical ID: 3829

General Client Employee Call Log **Merge Calls**

Visit From Date

09/28/2023

Call In

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When the Visit Details screen opens, you see the “Merge Calls” tab is available to use. That’s good news, because it may offer us an easy way to get the rest of the visit information we need. If it isn’t there, a merge isn’t possible.

Click on the Merge Calls tab to view other calls that might complete the information here.

# Merging Calls

Confirm  
the  
correct  
visit.

Select  
the  
row.

BACK

Visit From Date: 09/28/2023

Client ID: 695459 | Client Name: Jackson, Cedrick | Medicaid ID: 3829382839 | Employee ID: 509512 | Employee Name: Soni, Chandni

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"/>	(63-8	02:48 PM	09/27/2023	Jackson, Cedrick	Sc
<input type="radio"/>	(63-8	02:52 PM	09/27/2023	Jackson, Cedrick	Sc
<input type="radio"/>	(63-8	12:48 PM	09/28/2023	Jackson, Cedrick	Sc
<input type="radio"/>	(63-8	02:31 PM	09/28/2023	(63-8	
<input type="radio"/>	(63-8	02:32 PM	09/28/2023	(63-8	
<input type="radio"/>	(63-8	02:33 PM	09/28/2023	(63-8	
<input type="radio"/>	(63-8	02:33 PM	09/28/2023	(63-8	
<input checked="" type="radio"/>	(63-8	02:34 PM	09/28/2023	Jackson, Cedrick	Sc
<input type="radio"/>	(63-8	03:11 PM	09/28/2023	(63-8	
<input type="radio"/>	(63-8	03:11 PM	09/28/2023	Jackson, Cedrick	Sc

The system gives these possibilities of incomplete visits to merge. Some of them are from the day before, September 27, and some are from the same date, September 28.

You may need to confirm with the employee or client to find the accurate match to the visit. In this example, we found the row with the 2:34 p.m. call time on September 28, is accurate.


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

# Merging Calls

- From the drop-down menu, click the **reason code** and **resolution code**.
- Enter a **reason note** if needed.
- **Save**.

\* indicates required field

<b>Reason Code *</b> <input type="text" value="Select Reason Code"/> <small>Reason Code is required.</small>	<b>Resolution Code *</b> <input type="text" value="Select Resolution Code"/>	<b>Reason Note</b> <input type="text" value="Enter Reason Note"/>
--	---	--

 **SAVE**

85

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

- 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.



# Merging Calls

The two rows of information are merged to one row.

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	VISIT STATUS	DO NOT BILL
Jackson, Cedrick	So [REDACTED] ni	Speech Therapy - Individual/Visit	09/28/2023	02:34 PM 03:15 PM 00:41	02:34 PM 03:15 PM	Incomplete	<input type="checkbox"/>
(630) 588-5888	•	•	09/28/2023	02:31 PM •	02:31 PM	Incomplete	<input type="checkbox"/>
(630) 588-5888	•	•	09/28/2023	02:32 PM •	02:32 PM	Incomplete	<input type="checkbox"/>
(630) 588-5888	•	•	09/28/2023	02:33 PM •	02:33 PM	Incomplete	<input type="checkbox"/>
(630) 588-5888	•	•	09/28/2023	02:33 PM •	02:33 PM	Incomplete	<input type="checkbox"/>
(630) 588-5888	•	•	09/28/2023	03:11 PM •	03:11 PM	Incomplete	<input type="checkbox"/>
(630) 588-5888	•	•	09/28/2023	03:14 PM •	03:14 PM	Incomplete	<input type="checkbox"/>
(630) 588-5888	•	•	09/28/2023	03:19 PM •	03:19 PM	Incomplete	<input type="checkbox"/>

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We can go back to view the row for the visit we edited and see the information we merged is now included.

The row from below that used to only have a 2:34 "call in" time is no longer in the list, because the information from it merged with that top row.

Success!

## Adding a Manual Call

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

# Add Manual Call

- Check for the Merge Calls tab 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 tab 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 Sandata means by "a manual call."

Let's look at an example.

# Add Manual Call

Click on the row to select the visit.

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
It [redacted] ila	PEMA, SHERPA	Private Duty Nursing - RN/Hour	03/25/2024	12:57 PM	●		12:57 PM			Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	

As usual: you will click the row to select the visit.

# Add Manual Call

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

Client ID#: 264471 | Client Name: Itzen, Sheila | Medical ID#: 789556611 | Employee ID#: 10006155 | Employee Name: PEMA, SHERPA

General Client Employee **Call Log** Merge Calls Tasks Exceptions GPS Memo Claims History

**Call Log Information Section**

Call In		Call Time	12:57 PM	Call Type	MVV (Mobile, GPS)	Service	Private Duty Nursing - RN/4hour
Call Date	03/25/2024	Latitude	45.1	Longitude	-91.75	Call Source	UAT VendorTest
User	sheila@itzen.com	Time Zone	America/Chicago	Offline Visit	No		

**Add Manual Call**

\* indicates required field

Call Date MM/DD/YYYY \*

Call Time HH:MM AM/PM \*

Service

Time Zone


Required

\* indicates required field

Reason Code \*

Resolution Code

Reason Note



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In this example, a Merge Call tab does not appear near the top. There aren't any calls that the system thinks could complete this one, so we'll ask the employee or client for the details and enter them here.

Then as we've seen before:

- 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.

# Create Call

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

# Create Call

Difference between Create Call, Manual Call (previous section), and Create Visit (next section):

- **Create Call** has limited use. It is used when a visit is in progress, and *only an in call* needs to be created to start a visit.
- **Manual Call** is used when a visit exists in the past but is missing a single call in or call out time.
- **Create Visit** is used when an entire visit needs to be created, from start to finish (see next section).

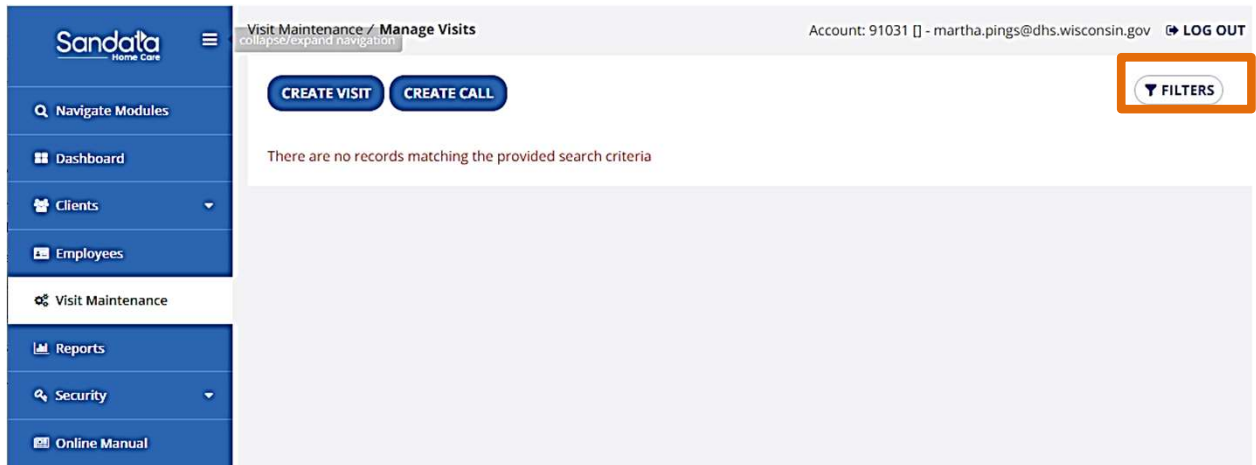
92

What's the difference between Create Call and Manual Call?

- **Create Call** has limited use. It is used when a visit is in progress, and only an in call needs to be created. Maybe the employee called the provider at the start of the visit because they could not use the usual check in method.
- **Manual Call** is used when a visit exists in the past but is missing a single call in or call out time. You might be able to merge with another incomplete visit, or you may need to add a single in or out time.
- **Create Visit** is used when an entire visit needs to be created, from start to finish (see next section).

# Create Call

Use the **Filters** button to view visits and avoid duplicates.



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It's best to start with Filters to look for the visit, so you can make sure the call is truly missing and you're not creating a duplicate.



# Create Call

Within the filter, select the information needed.

**Filter Visits By** should be set to "All Visits."

Click **Apply Filters** when you are ready.

- If the visit exists, make sure the information is correct.

A screenshot of a 'Filters' panel in a software application. The panel contains various input fields and dropdown menus for filtering search results. The fields include: 'From Date' (12/18/2024), 'To Date' (12/18/2024), 'Client' (Enter Client), 'Employee' (Enter Employee), 'Payer' (Select Payer), 'Program' (Select Program), 'Service' (Select Service), 'Category' (Select Category), 'Visit Status' (Select Visit Status), 'Client Medicaid ID' (Enter Client Medicaid ID), 'Filter Visits By' (All Visits), 'Exception Types' (Select Exception Types), 'Call Type' (Select Call Type), 'Employee Other ID' (Enter Employee Other ID), 'Supervisors' (Select Supervisors), 'Department' (Select Department), 'Group Visit Code' (Select Group Visit Code), and 'Visit Key' (Enter Visit Key). At the bottom of the panel are buttons for 'CLEAR', 'RESET', 'APPLY FILTERS', and 'SAVE SETTINGS'. The 'APPLY FILTERS' button is highlighted with an orange border.

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).

Filter Visits By should be set to "All Visits."

Click "Appy Filters" when you are ready.

If the visit exists, simply sure the information is correct.

# Create Call

If the visit currently in progress is missing, click the **Create Call** button.



If the visit currently in progress isn't found, click the Create Call button.

# Create Call

- Find the client. Use the **Filters** feature to shorten the list.
- Select the client using the **Actions** button on the right.
- Click **Next**.

The screenshot shows a web interface for creating a call. At the top, there are three numbered tabs: '1 Find Client' (highlighted with an orange box), '2 Find Employee', and '3 Set Date and Time'. Below the tabs is a 'CANCEL' button on the left. The main area contains a table with client information. On the right side of the table, there are three orange arrows with numbers 1, 2, and 3 pointing to the 'FILTERS', 'ACTIONS', and 'NEXT' buttons respectively. The 'ACTIONS' button is highlighted with an orange box.

CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	SUPERVISOR	LAST ACTIVE DATE
994225	adams, adam	1231231231		
837171	adams, anna	1231231222		
913365	Adams, John	0007041776		
106550	ANTBCBS, NineNineFiveZeroFour	2334444269		

The numbered steps tabs at the top will automatically lead you through the information you'll need to add.

First, find the client. You can scroll down the list of all clients or use the Filters feature to shorten the list to one client's name.

Second, select the client using the Actions button on the right.

Third, click Next.

# Create Call

- On the **Find Employee** screen, open the **Filters**.
- Enter the employee's name or leave blank for a list of all employees.
- Click **Apply Filters**.

The screenshot shows the 'Find Employee' screen with three numbered steps: 1. Find Client, 2. Find Employee (highlighted with an orange box), and 3. Set Date and Time. The 'Find Employee' section contains a large text area with a 'CANCEL' button and the text 'No search performed yet'. To the right, the 'Filters' modal is open, showing input fields for 'Employee First Name', 'Employee Last Name', 'Employee ID', and 'Santrax ID'. Below these fields are 'CLEAR' and 'APPLY FILTERS' buttons. An orange arrow points from the 'FILTERS' button in the bottom right corner to the 'APPLY FILTERS' button in the modal. The bottom right corner also features 'PREVIOUS' and 'NEXT' buttons.

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The Find Employee screen will display next.  
Click on the Filters button to search for a specific employee name or leave it all blank for a list of all employees.  
Click Apply Filters.

# Create Call

- Select the employee, using the **Actions** button on the right.
- Click **Next**.

1 Find Client      2 Find Employee      3 Set Date and Time

CANCEL      PREVIOUS      NEXT

FILTERS

EMPLOYEE ID	EMPLOYEE NAME	SANTRAX ID	LAST ACTIVE DATE	ACTIONS
759260	Bl [redacted] in	000759260		<input type="radio"/>
293890	Caregiver, Amber	000293890		<input checked="" type="radio"/>
251948	Caregiver, Chris	000251948		<input type="radio"/>

More than one employee may display, depending on the information you entered for the search.

Select the employee using the Actions button at the right.  
Click Next.

# Create Call

- Enter the start date and time, location, and service.
- Click **Save**.

1 Find Client      2 Find Employee      3 Set Date and Time

CANCEL

PREVIOUS SAVE

\* indicates required field

Call Date MM/DD/YYYY \*

09/26/2024

Call Time HH:MM AM/PM \*

08:00 AM

Time Zone

US/Central

Location \*

Select Location

Service

Select Service

GENERATE GROUP VISIT C

CANCEL



PREVIOUS SAVE

Now, the Set Date and Time screen will display.  
Enter the remaining information: the start date and time, location, and service.  
Click Save.

# Create Call

- The Visit Status is listed as "In Process."
- The visit will show an exception in the Call Out column until the visit is ended.

Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTIONS
adams, adam	Caregiver, Amber	Mechanical Vent Care/Hour	09/26/2024	08:00 AM			08:00 AM			In Process	<input type="checkbox"/>		
Total: 00:00													

25 of 1 entries

« < 1 > »

100

Notice that the "Visit Status" column shows the visit is "In Process."  
Since only a call in was created, the visit will show an exception in the Call Out column until the visit is ended.

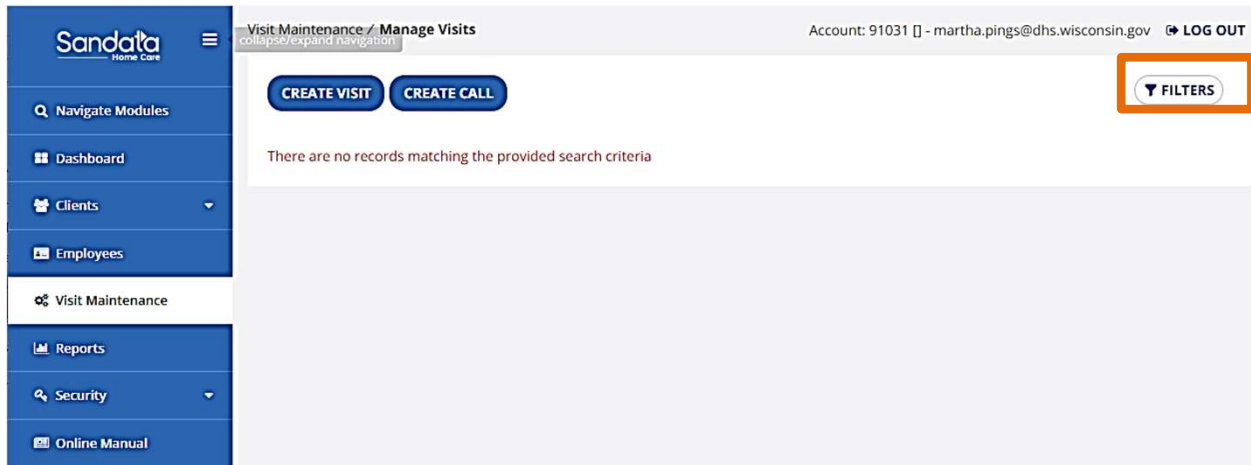
# Create Visit

Let's see how you create a complete visit on the Sandata EVV portal as an administrator, from start to finish. This is used when a worker (or independent nurse) forgot to check in and out for the entire visit.



# Create Visit

Use the “Filters” option to view visits.



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It's best to start with Filters, so you can make sure the visit is truly missing and you're not creating a duplicate.

# Create Visit

Within the filter, select the information needed.

**Filter Visits By** should be set to "All Visits."

Click **Apply Filters** when you are ready.

- If the visit exists, make sure the information is correct.
- If the visit is missing, create the visit.



Filters

From Date \* 12/18/2024

To Date \* 12/18/2024

Client Enter Client

Employee Enter Employee

Payer Select Payer

Program Select Program

Service Select Service

Category Select Category

Visit Status Select Visit Status

Client Medicaid ID Enter Clients Medicaid ID

Filter Visits By All Visits

Exception Types \* Select Exception Types

Call Type Select Call Type

Employee Other ID Enter Employee Other ID

Supervisors Select Supervisors

Department Select Department

Group Visit Code Select Group Visit Code

Visit Key Enter Visit Key

CLEAR

RESET

APPLY FILTERS

SAVE SETTINGS

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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).

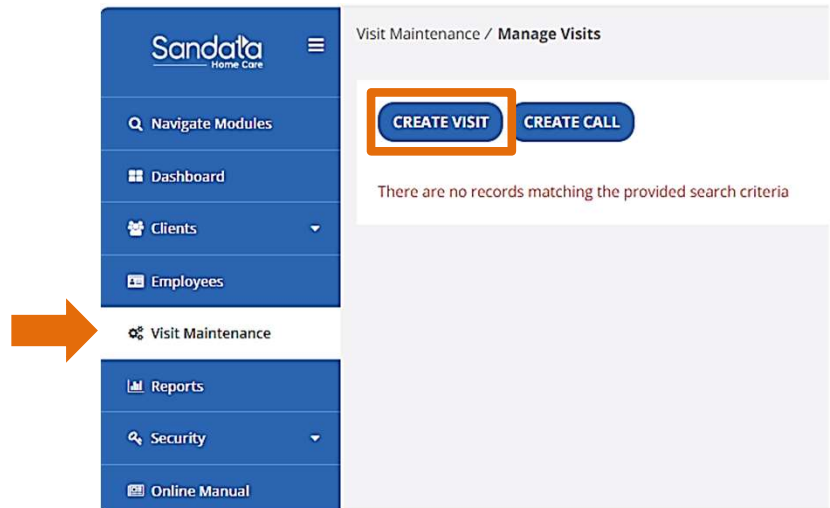
Filter Visits By should be set to "All Visits."

Click "Apply Filters" when you are ready.

- If the visit exists, make sure the information is correct.
- If the visit is missing, create the visit.

# Create Visit

- Click on **Visit Maintenance.**
- Click **Create Visit.**



If you've confirmed the visit doesn't already exist:  
Click on Visit Maintenance.  
Click Create Visit

# Create Visit

- Find the client. Use the **Filters** feature to shorten the list.
- Select the client using the **Actions** button on the right.
- Click **Next**.

1 Find Client 2 Find Employee 3 Set Date and Time

CANCEL

Filters

CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	SUPERVISOR	LAST ACTIVE DATE	ACTIONS
994225	adams, adam	1231231231			<input type="radio"/>
837171	adams, anna	1231231222			<input type="radio"/>
913365	Adams, John	0007041776			<input type="radio"/>
106550	ANTBCBS, NineNineFiveZeroFour	2334444269			<input type="radio"/>

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The numbered steps tabs at the top will automatically lead you through the information you'll need to add.

First, find the client. You can scroll down the list of all clients or use the Filters feature to shorten the list to one client's name.

Select the client using the Actions button on the right.

Click Next.

# Create Visit

- On the **Find Employee** screen, open the **Filters**.
- Enter the employee's name or leave blank for a list of all employees.
- Click **Apply Filters**.

The screenshot shows the 'Find Employee' screen with the 'Filters' modal open. The 'Find Employee' step is highlighted with a blue circle and an orange box. The 'Filters' modal contains four input fields: 'Employee First Name', 'Employee Last Name', 'Employee ID', and 'Santrax ID'. An orange arrow points from the 'FILTERS' button in the bottom right corner to the 'APPLY FILTERS' button in the modal. The 'Find Client' step is labeled '1' and the 'Set Date and Time' step is labeled '3'. The 'Find Employee' step is labeled '2'.

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The Find Employee screen will display next.  
Click on the Filters button to search for a specific employee name or leave it all blank for a list of all employees.  
Click Apply Filters.

# Create Visit

- Select the employee, using the **Actions** button on the right.
- Click **Next**.

1 Find Client      2 Find Employee      3 Set Date and Time

**CANCEL**      **PREVIOUS**      **NEXT**

▼ FILTERS

EMPLOYEE ID	EMPLOYEE NAME	SANTRAX ID	LAST ACTIVE DATE	ACTIONS
759260	Bl [redacted] in	000759260		<input type="radio"/>
293890	Caregiver, Amber	000293890		<input checked="" type="radio"/>
251948	Caregiver, Chris	000251948		<input type="radio"/>

More than one employee may display, depending on the information you entered for the search.

Select the employee using the Actions button at the right.  
Click Next.

# Create Visit

- Enter the date and time information, location, service, reason code, and resolution code.
- Click **Add**.

1 Find Client      2 Find Employee      3 Set Date and Time

CANCEL

PREVIOUS   SAVE & ADD ANOTHER   ADD

Overnight ☐

Call Date MM/DD/YYYY \*  
09/26/2024

Call In Time HH:MM AM/PM \*  
--:--

Call Out Time HH:MM AM/PM \*  
--:--

Hours  
0

Time Zone  
US/Central

Location \*  
Select Location

Services  
Select Services

Reason Code \*  
Select Reason Code

Resolution Code  
Select Resolution Code

Reason Note  
Enter Reason Note

CANCEL

PREVIOUS   SAVE & ADD ANOTHER   ADD

On the Set Date and Time screen, enter the remaining information: the date and time of the visit, location, service, the reason code and resolution code. Click Add.

If the visit was for an overnight, be sure to check the "Overnight" box near the top left, marked here with an arrow. This will let you enter a call out date that is different from the call in date.

# Create Visit

- The Visit Status is listed as “Verified.”
- The visit will show with the yellow dot. This means it was manually entered.

Visit Maintenance / Manage Visits Account: 91031 - martha.pings@dhs.wisconsin.gov Enter agency LOG OUT

CREATE VISIT CREATE CALL FILTERS SHOW DISPLAY OPTIONS EXPORT DATA

Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTIONS
adams, adam	Caregiver, Amber	Mechanical Vent Care/Hour	09/26/2024	01:00 AM	10:00 AM	09:00	01:00 AM	10:00 AM		Verified	<input type="checkbox"/>		

Total: 09:00

Notice that the “Visit Status” column shows the visit is in a “Verified” status. There are no exceptions (red or orange dots) for this visit. (Remember, according to Sandata’s legend in the upper left corner, the yellow dot means it was manually entered. This does not need correction.)

The visit will show in Visit Maintenance with the yellow dot. This is an informational dot, and means the visit was manually entered. It is not an exception.



# 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.

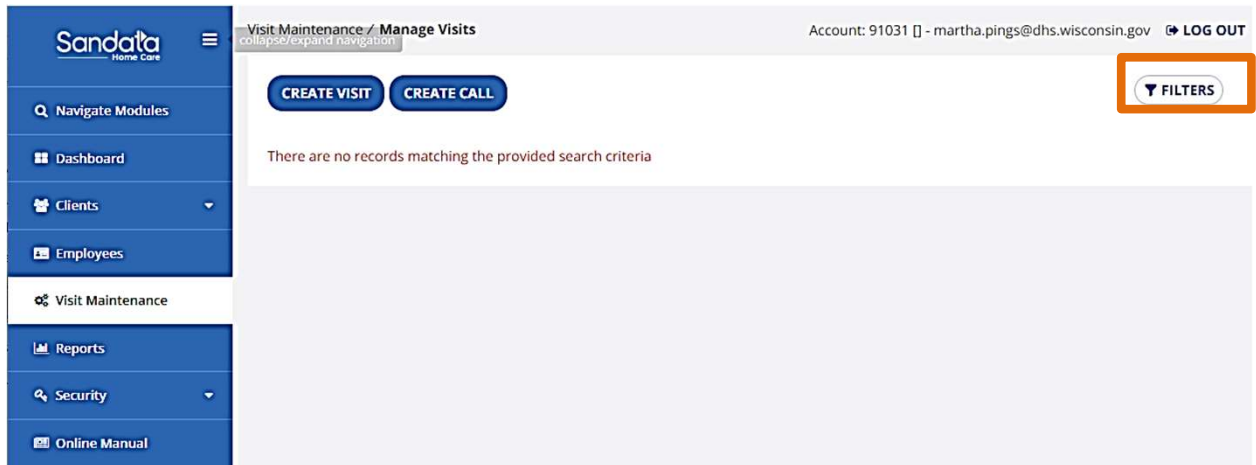
Adjusting call in or call out times can be done on any visit if necessary, including verified visits.

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 considered complete and has no exceptions?

# Adjusting Call In or Call Out

Use the “Filters” option to view visits.



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Use the Filters option in the Visit Maintenance area to find the visit.

# Adjusting Call In or Call Out

- Select “All Visits” from the **Filter Visits By** drop-down menu.
- Enter other information such as the date span, client name, and employee name. →
- Click **Apply Filters**.

The 'Filters' dialog box includes the following fields:

- From Date: 12/18/2024
- To Date: 12/18/2024
- Client: Enter Client
- Employee: Enter Employee
- Payer: Select Payer
- Program: Select Program
- Service: Select Service
- Category: Select Category
- Visit Status: Select Visit Status
- Client Medical ID: Enter Client Medical ID
- Filter Visits By: All Visits (selected)
- Exception Types: Select Exception Types
- Call Type: Select Call Type
- Employee Other ID: Enter Employee Other ID
- Supervisors: Select Supervisors
- Department: Select Department
- Group Visit Code: Select Group Visit Code
- Visit Key: Enter Visit Key

Buttons at the bottom: CLEAR, RESET, **APPLY FILTERS** (highlighted), and SAVE SETTINGS.

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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).

Select “All Visits” from the “Filter Visits By” dropdown menu. This will include visits that don’t have exceptions.

You can also enter in a date span and client or employee name to search for exactly the visit you need.

Click “Appy Filters” when you are ready.

# Adjusting Call In or Call Out

Click on the pencil icon to select the visit for an edit.

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	ADJUSTED IN	ADJUSTED OUT	VISIT STATUS	ACTIONS
BURNS, B	PEMA, SHERPA	Unspecified Home Visit - RN and LPN/Visit	11/17/2023	10:02 AM	10:27 AM	10:02 AM	10:27 AM	Verified	

Here we have a visit without any exceptions. To edit this visit, click on the pencil icon.

# Adjusting Call In or Call Out

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

The screenshot shows a software interface with a top navigation bar containing the following tabs: General, Client, Employee, Call Log, Tasks, Exceptions, GPS, Memo, Claims, and History. The 'General' tab is selected and highlighted with an orange border. Below the navigation bar, there are several input fields arranged in a grid. The fields are: Visit From Date (11/17/2023), Visit To Date (11/17/2023), Visit Time Zone (America/Chicago), Visit Status (Verified), Call In (10:02 AM), Call Out (10:27 AM), Call Hours (00:25), and Units (None). At the bottom of the form, there are four fields: Adjusted In Date (11/17/2023), Adjusted In (10:02 AM), Adjusted Out Date (11/17/2023), and Adjusted Out (10:27 AM). These four fields are highlighted with a thick orange border. Each of these bottom fields has a small calendar icon to its right.

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And now you can correct.



In the "General" tab, enter the correct information in the Adjusted In or Adjusted Out fields.

# Adjusting Call In or Call Out

- From the drop-down menu, click the **reason code** and **resolution code**.
- Enter a **reason note** if needed.
- **Save.**

\* Indicates required field

<b>Reason Code *</b> <input type="text" value="Select Reason Code"/> <small>Reason Code is required.</small>	<b>Resolution Code *</b> <input type="text" value="Select Resolution Code"/>	<b>Reason Note</b> <input type="text" value="Enter Reason Note"/>
--	---	--

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As usual when there are edits, the reason and resolution fields will display. Use the drop-down menus to enter the required information.

Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)

Then click Save.

# Omit Status

We have a few last tools to introduce to you. The first is setting a visit's status to "Omit." We've already seen "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
- Duplicate manual visits created in error

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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
- Duplicate manual visits created in error

# Omit Status

Robocalls may come into 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 these 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**.

Show Legend

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
Fiction, Jane	Test, John	Unspecified Therapeutic Procedure - OT/Visit	01/12/2024	08:00 AM	11:45 AM	03:45	08:00 AM	11:45 AM		Omit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Total: 03:45													

**Update Do Not Bill**

\* indicates required field

Reason Code \*

Reason Code is required.

Resolution Code

Reason Note

CANCEL

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. Note that the "Visit Status" column now shows "Omit," since the "Do Not Bill" box is marked.

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.

# Client Verification, Notes, and Tasks

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

## Client Verification, Notes, 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 for T1019 personal care services.
- Personal care providers should check with their HMOs, MCOs, or IRIS FEA regarding documentation requirements.
- Home health care service providers do not need 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 for T1019 personal care services.
- Personal care providers should check with their HMOs, MCOs, or IRIS FEA regarding documentation requirements.
- For home health care providers: Capturing client verification, notes, and tasks within the Sandata EVV app is not required for home health care service providers.

# Client Verification, Notes, 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.

Report Parameters  
Account: MOM HOME HEALTH AND PC - CROP (81031)  
For: 12/1/2023 - 12/31/2023 11:56:59 PM

EMPLOYEE VISIT LOG

PAYER: CAREWI		VISIT		LOCATION IN		LOCATION OUT		EMPLOYEE		CLIENT							
PRG	VISIT KEY	DATE	TIME IN	TIME OUT	HOURS	STATUS	LATITUDE, LONGITUDE	PHONE #	LATITUDE, LONGITUDE	PHONE #	NAME	EMPLOYEE ID	SANTRAX ID	NAME	ID / MEDICAID	SIG	OFFLINE VISIT
WIHMO	2159144788	12/29/2023	1:08 PM	1:17 PM	0.15	Verified		303		303	PASANO, SHERPA	108006156	100006156	Ma	N 871001	N	N/A
HCPCS:		99504															
Task Line		0100															
Total Hours:					0.15												
Grand Total Hours:					0.15												

Note: Report is limited to Verified Visits only. Visits with remaining exceptions in an Incomplete status are not included.

Sandata

04/12/2024 13:06:09

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If any part of the record of care is missing from the Sandata EVV portal, it will not create an exception.

Therefore, the best way to monitor record of care data collection is using the Sandata Employee Visit Log date range report. This report was created specifically for Wisconsin's personal care providers. You can easily see which visits have the tasks, notes, and client verification using this report.

# Client Verification, Notes, and Tasks

In Visit Maintenance, use **Show Display Options** to view Client Verified, Memo, and Tasks columns for visits.

**SHOW DISPLAY OPTIONS**

Show Display Options

- ☐ Adjusted Hours
- ☐ Adjusted In
- ☐ Adjusted Out
- ☐ Approved
- ☐ Call Hours
- ☒ Call In
- ☒ Call Out
- ☐ Claims Verification Status
- ☐ Client ID
- ☐ Client Medicaid ID
- ☒ Client Name
- ☐ Client Primary Phone Number
- ☒ Client Verified
- ☐ Do Not Bill
- ☐ Employee Contact Phone Number
- ☐ Employee ID
- ☒ Employee Name
- ☐ Employee Other ID
- ☐ Exported
- ☐ Group Visit Code
- ☐ In-Out Call Location
- ☒ Memo
- ☐ Offline Visit
- ☐ Payer
- ☐ Program
- ☐ Santrax ID
- ☒ Service
- ☐ Supervisor
- ☒ Tasks
- ☐ Units
- ☒ Visit Date
- ☒ Visit Status

RESET

In addition to the Employee Visit Log report, in Visit Maintenance you can choose "Show Display Options" to add Client Verified, Memo, and Tasks columns to view in a list of visits

# Client Verification, Notes, and Tasks

- **Export Data** to save to your computer.
- Click on a row to see more details.



FILTERS

SHOW DISPLAY OPTIONS

EXPORT DATA

Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	Sort by TASKS TASKS	VISIT STATUS	MEMO	CLIENT VERIFIED	ACTIONS
Chris, WIMember	Austin, T	Personal Care Svc/15min	04/11/2023		01:52 PM	3	Verified	Emp...	Y	
BILLS, RICK	Austin, T	Supportive Home Care/15min	11/22/2022	12:01 PM	12:06 PM	1	Incomplete		Y	
Tester, Helen	Austin, T	Personal Care/Day	11/23/2022		11:23 AM	1	Incomplete		Y	
	Austin, T	Personal Care/Day	10/10/2022		04:39 PM	1	Incomplete		Y	
Ace, WIMember	Caregiver, Carrie	Personal Care Svc/15min	04/11/2023	01:00 AM	02:00 AM	0	Verified		N	
Ace, WIMember	SHERPA, DIL	Personal Care Svc/15min	04/11/2023	01:00 AM	03:00 AM	0	Verified		N	

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Use the "Export Data" button to save the information to your computer as a CSV or Excel file.

As usual, to see more details of the visit, click on the row.



# Client Verification, Notes, and Tasks

Use the “General” tab to view client verification information.

The screenshot shows the 'General' tab of the Visit Details screen. The tab is highlighted with an orange box. The form contains the following fields:

Field	Value
Visit From Date	None
Visit To Date	04/11/2023
Visit Time Zone	US/Central
Visit Status	Verified
Call In	None
Call Out	01:52 PM
Call Hours	None
Adjusted In Date	04/11/2023
Adjusted In	08:03 AM
Adjusted Out Date	04/11/2023
Adjusted Out	01:52 PM
Agency ID	91030
Agency Name	LAMA SHERPA
Payer	Select Payer
Program	Select Program
Service	Select Service
Group Visit Code	
Client Verified Time	Yes
Client Verified Service	Yes
Client Signature	Yes
Offline Visit	No

In the Visit Details screen for that row, use the “General” tab to view client verification information. The fields are grayed out, showing they are read-only and cannot be changed.

# Client Verification, Notes, and Tasks

Use the "Tasks" tab view or edit the tasks.

General

Client

Employee

Call Log

Tasks

Exceptions

GPS

Memo

Claims

History

Tasks

TASK ID	DESCRIPTION	READING	MANUALLY ADDED	STATUS	SELECT TASK
0135	Toileting		No	Completed	<input checked="" type="checkbox"/>
0305	Housekeeping		No	Completed	<input checked="" type="checkbox"/>
0310	Laundry as needed		No	Completed	<input checked="" type="checkbox"/>
0200	Bowel Program Medically Oriented Tasks				<input type="checkbox"/>
0205	Catheter Site Care Medically Oriented Tasks				<input type="checkbox"/>
0210	Complex Positioning Medically Oriented Tasks				<input type="checkbox"/>
0105	Dressing-Changing				<input type="checkbox"/>
0120	Eating Assistance				<input type="checkbox"/>
0300	Eyeglass-Hearing Aids Care				<input type="checkbox"/>
0215	Feeding Tube Site Care Medically Oriented Tasks				<input type="checkbox"/>

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Use the "Tasks" tab to view or edit the tasks. Click the button in the "Select Task" column on the right to add or remove any tasks. If edits are made, the Reason Code and Resolution Code fields will show at the bottom for you to complete.

Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)

# Client Verification, Notes, and Tasks

Use the "Memo" tab view notes or add a memo.

The screenshot shows a software interface with a top navigation bar containing tabs: General, Client, Employee, Call Log, Tasks, Exceptions, GPS, Memo, Claims, and History. The 'Memo' tab is selected and highlighted with an orange border. Below the navigation bar, the main content area is divided into two sections. The top section, labeled 'MEMO', contains a text input field with the text 'Employee (Terry) called office later with note that the client (Chris) did not want to eat lunch.' Below this field, it says '926 characters remaining.' To the right of this section is a blue 'SAVE' button. The bottom section, labeled 'VISIT NOTE', contains a text input field with the text 'testing with manual auth created and then auth via feed'. This section is grayed out, indicating it is not editable.

Use the "Memo" tab to view notes entered during the visit. While visit notes (on the bottom) are grayed out and cannot be edited, the "Memo" field (on the top) can be used. Click "Save" if a memo is added.

# GPS Location

Another topic that is not an exception is GPS location.

# GPS Location

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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The GPS location data is informational only:

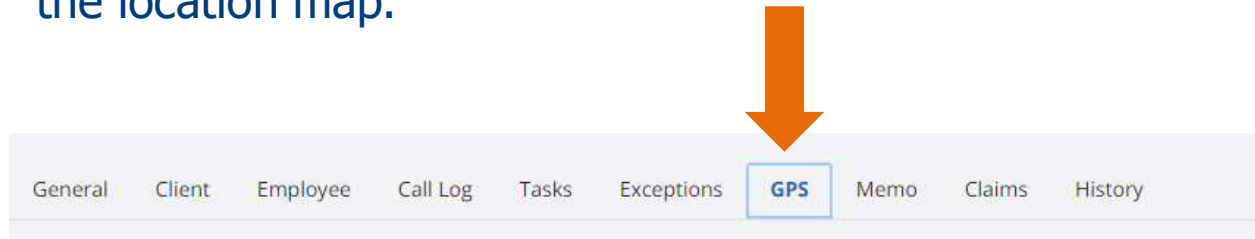
- GPS captures location information only at the start and end of a visit.
- GPS location data is required but does not prevent the EVV visit from going to a “verified” status.
- GPS data does not currently prevent claims from being paid.

Also understand that other divisions within DHS, such as the Office of Inspector General, may use GPS location.

# 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.



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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” since the check in and out were not done near an address on file with Sandata for the client.



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This location map shows a GPS “exception” (informational only) since check in and out were not done near an address on file with Sandata for the client.

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

Despite the labels provided in Sandata, GPS location is not considered an “exception.” GPS is informational only in Wisconsin.

# 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 the location of services using the **GPS Distance Exception** report.

## GPS DISTANCE EXCEPTION

### Report Parameters

Account: MOM HOME HEALTH AND PC - CROP (91031)  
For: 3/25/2024 - 3/25/2024 11:59:59 PM

ACCOUNT: MOM HOME HEALTH AND PC - CROP (91031)											
PAYER: None											
PROGRAM: None											
CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	EMPLOYEE ID	EMPLOYEE NAME	EMPLOYEE EMAIL	ACTUAL CALL DATE	ACTUAL CALL TIME	HCPCS	VISIT KEY	DISTANCE (FT)	CLOSEST CLIENT ADDRESS
913385	Adams, John	0007041778	100008155	PEMA, SHERPA	She [REDACTED].com	03/25/2024	12:53 PM T1019		2159159554	1191641 74 [REDACTED] Jence Ct, WI 53701-0000	
913385	Adams, John	0007041778	100008155	PEMA, SHERPA	She [REDACTED].com	03/25/2024	12:36 PM T1019		2159159554	1191641 74 [REDACTED] Jence Ct, WI 53701-0000	
Sub Total # of Visits		2									

Sandata

04/12/2024 13:45:49

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There is a report that summarizes GPS information, if providers would like to use it. It will show all the day's visits where the distance is further from a client's known address than expected. Look for "GPS Distance Exception" in the Daily Reports. It will show how far (in feet) the service was from an address on file.

Despite the name of this report, GPS location is not considered an "exception." GPS is informational only in Wisconsin.

# Resources

# Resources

- EVV Customer Care
  - Phone: 833-931-2035, Monday–Friday, 7 a.m.-6 p.m.
  - Email: [VDXC.ContactEVV@wisconsin.gov](mailto:VDXC.ContactEVV@wisconsin.gov)
- EVV webpage: [www.dhs.wisconsin.gov/evv/index.htm](http://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