Electronic Visit Verification: Visit Maintenance

November 2023
Wisconsin EVV

WISCONSIN DEPARTMENT of HEALTH SERVICES

P-02754 (12/2023)

Welcome to EVV's Visit Maintenance training.

Objectives

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

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

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

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Key Terminology

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

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

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

A “client” in the Sandata EVV system is frequently called a “member” or “participant” in Wisconsin’s service delivery.

Key Terminology

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

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

EVV Visit Lifecycle

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

EVV Visit Lifecycle

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

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

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

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

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

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

EVV Visit Lifecycle

Verification

Visits with all six required data elements are considered verified visits.

If necessary, the provider agency administrator makes manual edits in their EVV system to complete or correct the visit record. Sandata sends all of the day's visit files, including any edits and visits received from alternate EVV vendors, to DHS after midnight.

DHS then sends verified visits to the appropriate program payer the following day to be used for claims processing.

Validation

Visits should be in a verified status in the EVV system prior to the claim being sent. Incomplete visit records (those missing information) will not be used for claims or encounter processing.

The claim must correspond to the EVV visit record. This step ensures that each personal care or applicable supportive home care service has corresponding EVV data to support payment.

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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 call verification and is the step you see on the top of the slide.

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

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

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

Bottom line: By verifying visits, you are helping ensure claims are validated and your agency gets paid.

EVV Visit Lifecycle

Soft Launch

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

Hard Launch

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

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

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

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

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

EVV Visit Lifecycle

For providers, EVV does not change:

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

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

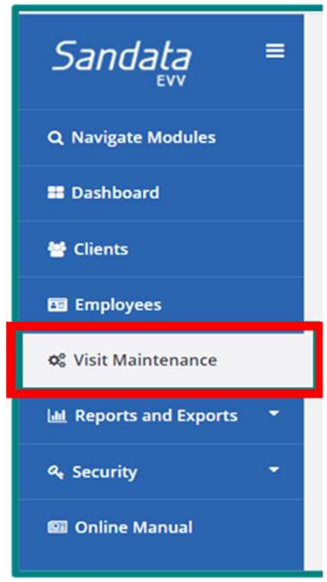
Sandata EVV Portal
Visit Maintenance

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

Sandata EVV Portal Visit Maintenance

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

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



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

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

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

Sandata EVV Portal Visit Maintenance

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

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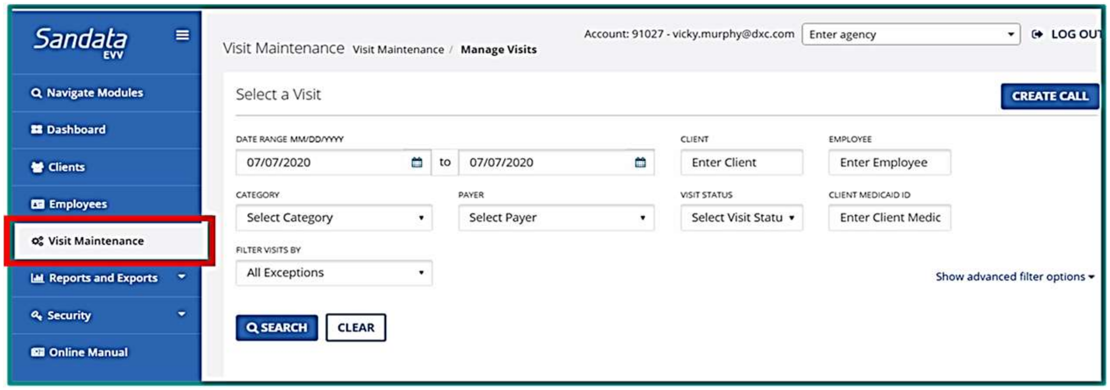
Here are some basic ideas to start:
Verify visits in a timely manner, so you can submit claims in a timely manner. Get visits verified before the claim is sent.
A visit can have several exceptions. Sometimes they are related and can be easily fixed.
The system defined roles that can edit visits in visit maintenance are:

System Admin
Coordinator

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

Visit Maintenance

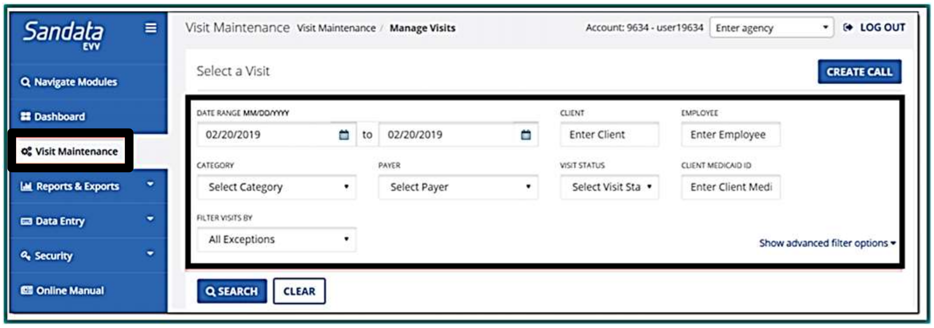
On the navigation panel, click Visit Maintenance to search for visits.



On the navigation panel, click Visit Maintenance to search for visits.
As we've recommended before, we invite you to use your mouse and move it to the Visit Maintenance module. Connect your muscle memory to your brain.

Visit Maintenance

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



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

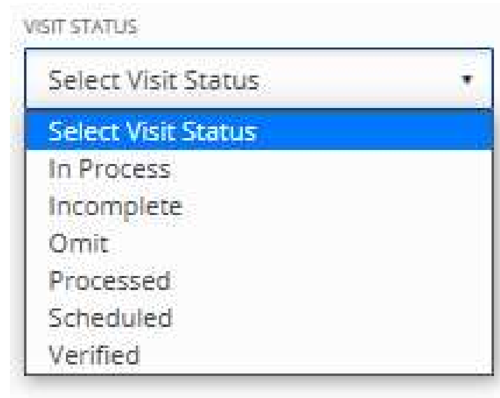
Use the drop-down menus in each field to filter the visit search. Fill in the fields desired – by date range, client name, employee name, or other information. You can keep some fields blank.
You can enter portions of a name if you are not sure of a spelling (for example, "Kell" if you are not sure if it's Kelly or Kelley).
There are also advanced filter options on the lower right.

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

Search Filters

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

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



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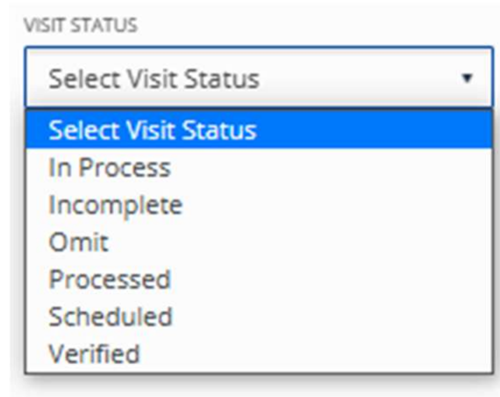
You can search for visits based on their "Visit Status." You can select from these choices:

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

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

Search Filters

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



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

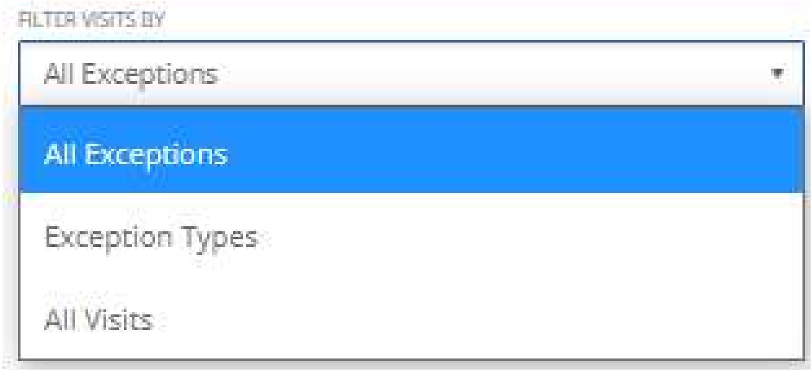
“Verified” will show all the visits that have all the data and require no further action.

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

Search Filters

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

- All Exceptions
- Exception Types
- All Visits



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

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

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

Search Filters

Filter Visits by All Visits

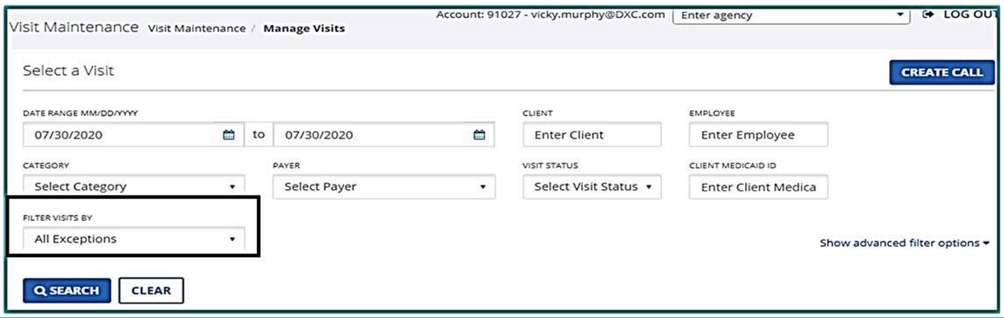
- All visits are displayed within the date parameters selected.
- Status results include verified, in process, omit, and incomplete.

If you filter visits by All Visits:
•All visits are displayed within the date parameters selected.
•Status results include verified, in process, omit, and incomplete. You'll see visits that are successful and ones that need attention.

Search Filters

Filter Visits by All Exceptions

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



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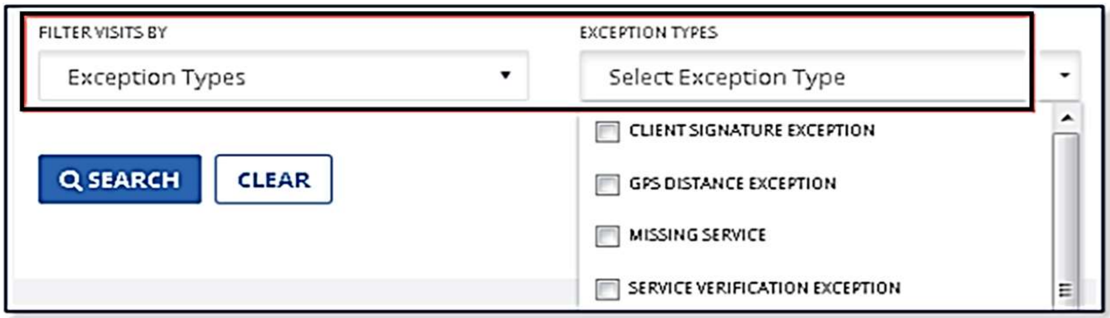
If you filter visits by All Exceptions
•Visits are displayed containing one or more exception (errors) within the specified time period.

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

Search Filters

Filter Visits by Exception Types

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

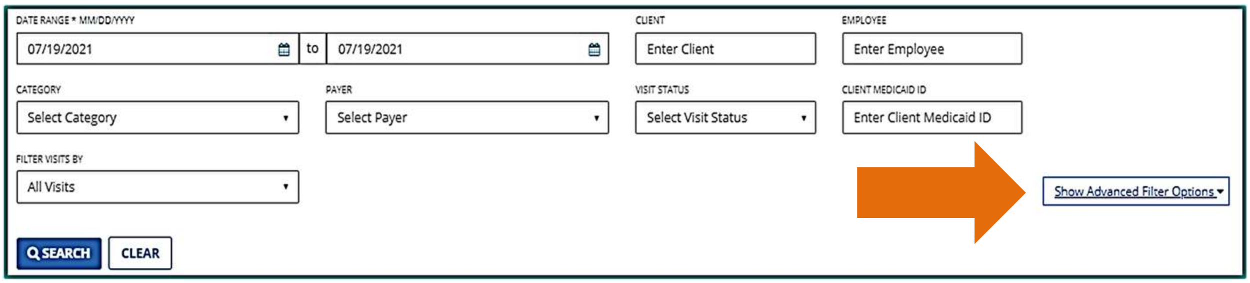


What if you filter visits by Exception Types?
•When selected, an additional field appears prompting the user to choose the specific exception type(s) from a drop-down menu.

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

Search Filters

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

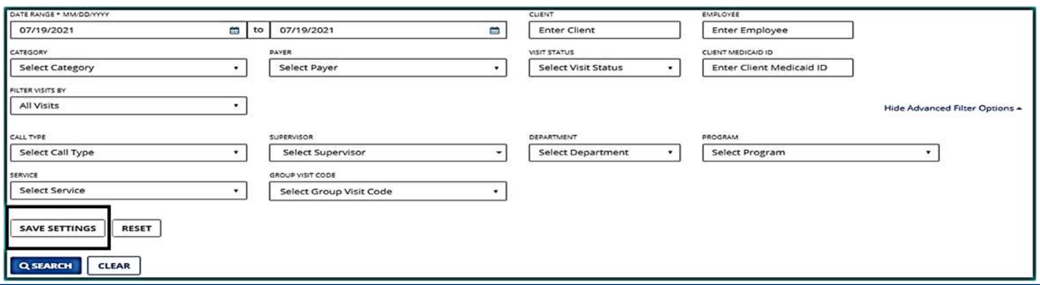


Once you find a search filter that works best for you, you can change this to be your default filter settings. To change default filters, click Show Advanced Filter Options.

Search Filters

Changing Default Filters

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



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

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

Identifying Exceptions

Visit exceptions are indicated by a colored dot.

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

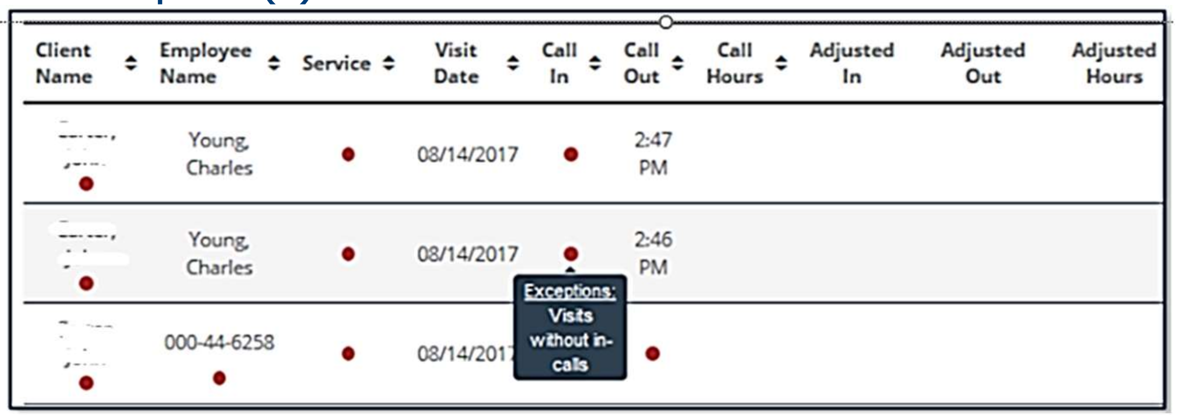
When you're done filtering, you may see a list of visits like this. Each row is a different visit. You can see the information that is summarized across each row.

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

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

Identifying Exceptions

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



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

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

Identifying Exceptions

Visit exceptions must be fixed or acknowledged:

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

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

Fix means to add missing data or change incorrect data.

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

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

Identifying Exceptions

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

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

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

Identifying Exceptions

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

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

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

Identifying Exceptions

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

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

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

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

Reason Codes

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

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

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

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

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

Reason Codes

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

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

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

Basic Steps: Exceptions

Select the exception dot.

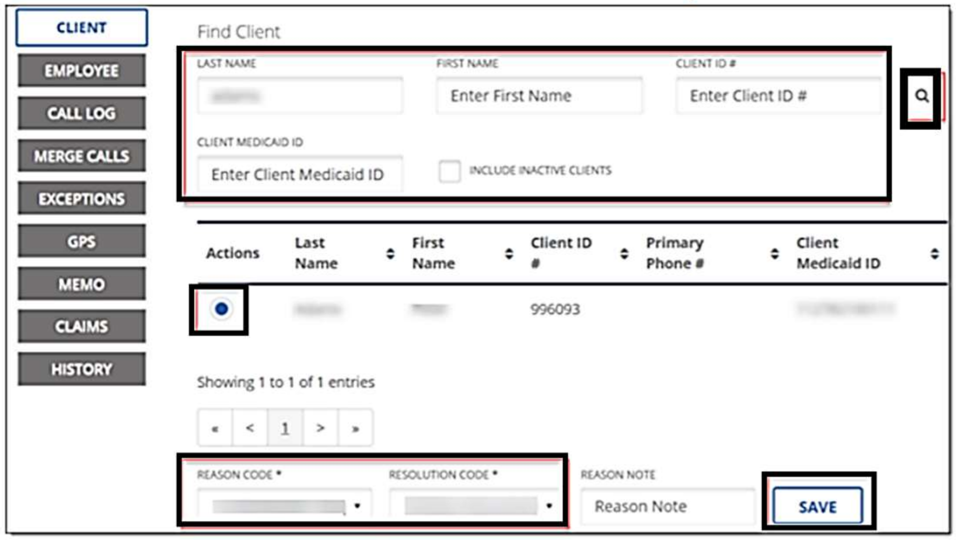
Client Name	Employee Name	Service	Visit Date	Call In	Call Out
(555)555-1307			10/27/2017	05:32 PM	

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

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

Basic Steps: Exceptions

Enter the corrections.

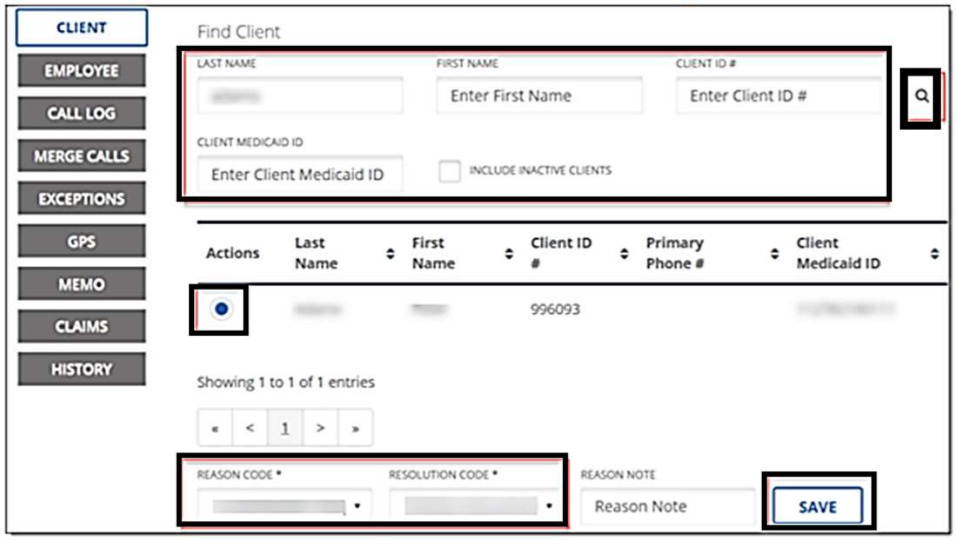


A new screen will open with the full details of the visit and bring you to the area of concern.

CORRECT: Enter in the corrections.

Basic Steps: Exceptions

Enter the corrections identified and **Save**.



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

Save.

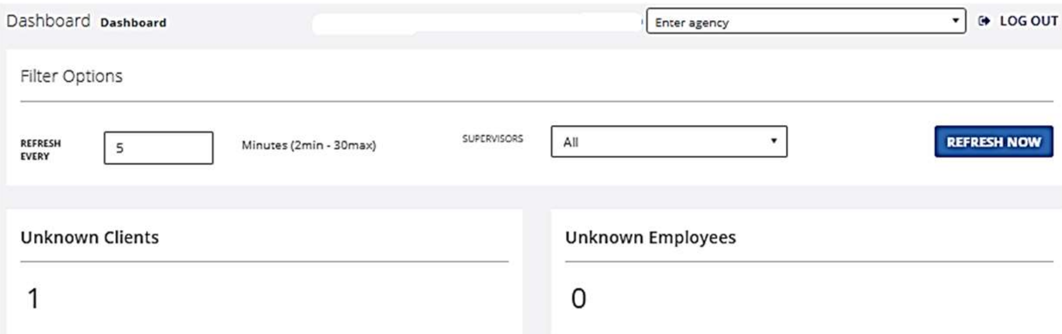
We'll see these steps over and over in the slides to come. Once you know the pattern you can get a rhythm going.

Sandata EVV Portal Dashboard

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

Sandata EVV Portal Dashboard

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



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

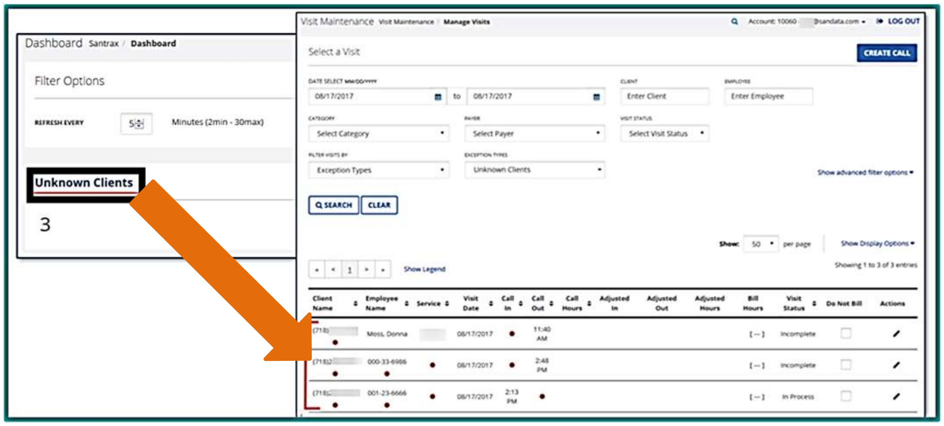
There are two exceptions that are highlighted on the dashboard. These will also appear in visit maintenance lists, of course, but this quick view can help providers quickly identify employees who may be missing key information. You can start to problem solve and prevent future exceptions right away.

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

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

Sandata EVV Portal Dashboard

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



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

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

Correcting Unknown Client Exceptions

First: correcting unknown client exceptions.

Unknown Client Exception

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

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

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

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

Here are some reasons this exception can occur:

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

Unknown Client Exception

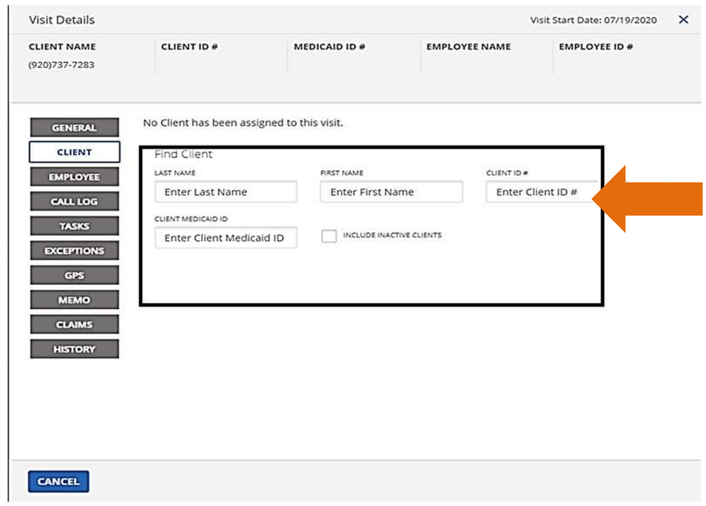
Click the exception dot under the Client Name column.

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

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

Unknown Client Exception

Use the search fields to search for the client.

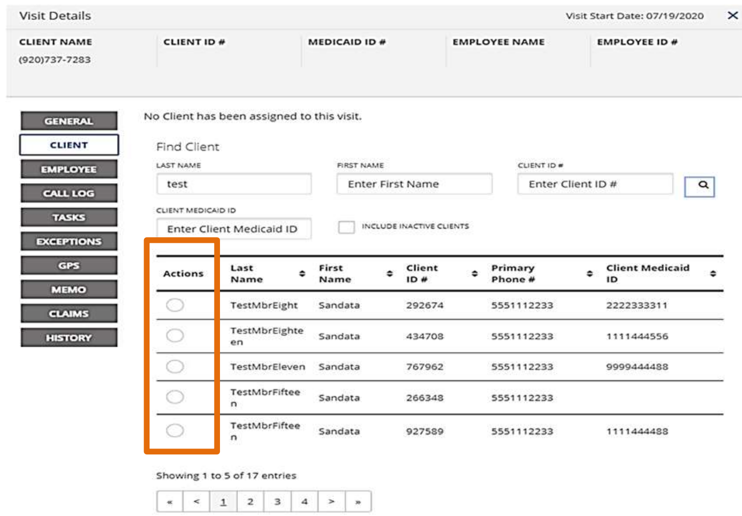


A new screen will open with the full details of the visit and bring you to the area needing correction. In this case, it brings you to the area that allows you to add the client.

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

Unknown Client Exception

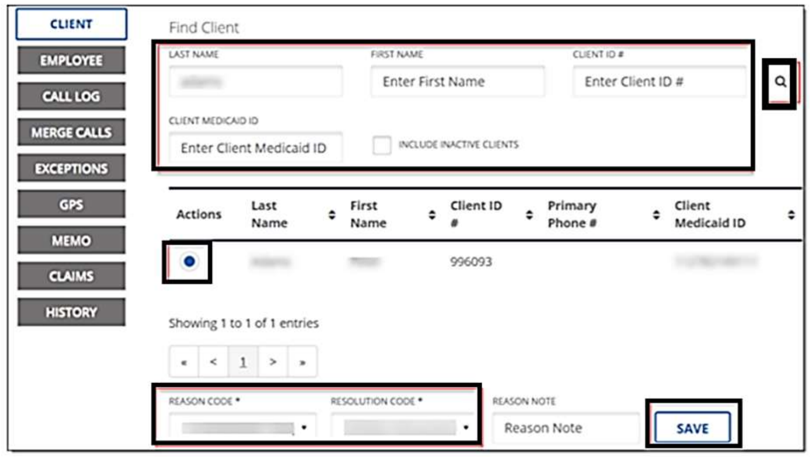
Click the button next to client name.



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

Unknown Client Exception

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



As we've seen before, an edit will bring these extra fields:
•Select a reason code from the drop-down list.
•Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)
•Click Save.

Unknown Client Exception

Tips for preventing Unknown Client exceptions:

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

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Here are some tips for preventing Unknown Client exceptions:

•Make sure approved authorization is in the Sandata EVV Portal.

  •If the authorization has not been approved, work with payers to ensure the approved authorization is sent to DHS.

  •If the authorization is approved but delayed, EVV Customer Care can help.

  •There are some situations where an authorization is not needed by policy. Where allowed, add client information: Only clients with under 50 hours of T1019 fee–or-service, clients with home health care EVV service codes, and clients with service code 99509. In these situations, DHS allows providers to enter the required authorization information in the Sandata system. We'll cover this in the "Entering required authorization information" presentation.

•Provide employees with a Worker Visit Card with the client's information, and make sure the Client ID is accurate..

•Remind employees to double-check their entries and retry when client is not found.

•Make sure an accurate landline phone number is on file, if the exception was in a TVV visit.

Correcting Unknown Employee Exceptions

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

Unknown Employee Exception

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

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

Let's go over how to fix this exception.

Unknown Employee Exception

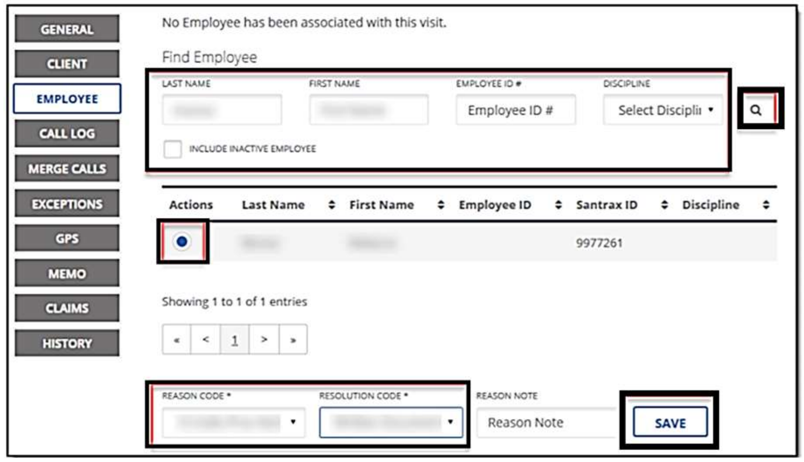
Click the exception dot under the Employee Name column.

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

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

Unknown Employee Exception

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



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

Unknown Employee Exception

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

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

Unknown Employee Exception

Tips for preventing Unknown Employee exceptions:

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

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Tips for preventing Unknown Employee exceptions:

•Add new workers on the ForwardHealth Portal and obtain the employee ID as soon as possible. This will be their Santrax ID to use during visits.

•Inform employees of their Santrax ID number.

•Provide employees with a Worker Visit Card, which includes the employee's Santrax ID. Make sure it's copied down correctly.

•Ask employees to check their Santrax ID if it is not recognized during a TVV or FVV call in or call out and retry the entry.

Correcting Missing Service Exceptions

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

Missing Service Exception

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

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

Service Codes

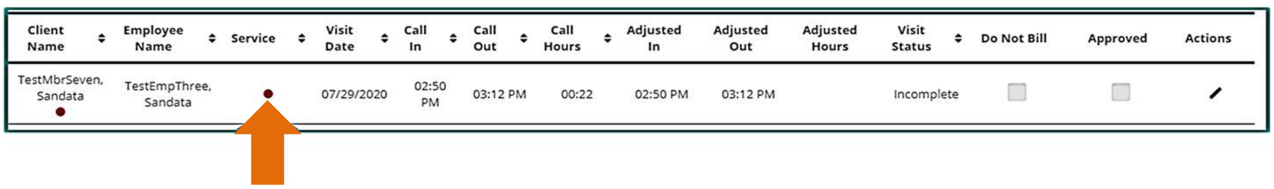
Service Code	SMC Service Code	TVV Service Code #
	Personal Care and Supportive Home Care Services	
T1019	Personal Care Svc/15 min	10
S5125	Supportive Home Care/15 min	15
S5126	Supportive Home Care/Day	20
T1020	Personal Care/Day	25
Combo	Combo-PCS & SHC	30
99509	PCS Nurse Supervisory Visit/Visit	55
	Home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

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

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

Missing Service Exception

Click the exception dot under the Service column.

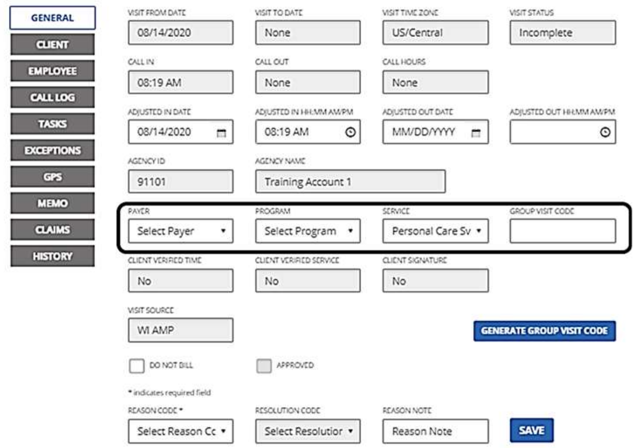


Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Visit Status	Do Not Bill	Approved	Actions
TestMbrSeven, Sandata	TestEmpThree, Sandata		07/29/2020	02:50 PM	03:12 PM	00:22	02:50 PM	03:12 PM		Incomplete			

Again: We'll select the exception.

Missing Service Exception

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

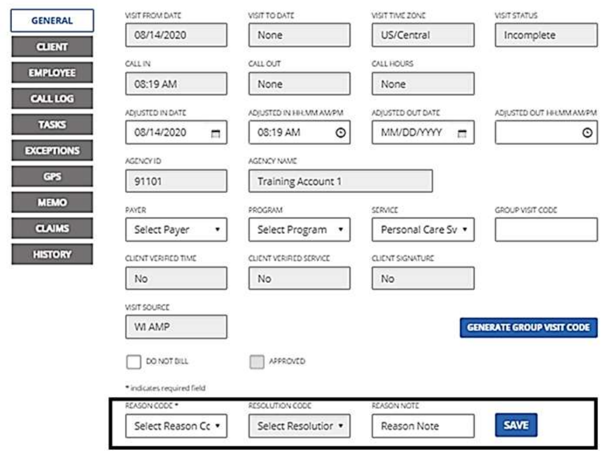


And we'll correct it.
To correct a missing service exception:

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

Missing Service Exception

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



Now we'll take care of the information at the bottom of the screen:
Select a **Reason Code** that best explains why the service was not selected at the time of visit. There's a drop-down list of options.
Select the resolution code **Written Documentation Maintained**.
Click Save.

Missing Service Exception

Tips for preventing Missing Service exceptions:

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

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

Correcting Unauthorized Service Exceptions

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

Unauthorized Service Exception

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

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

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

This exception occurs because:

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

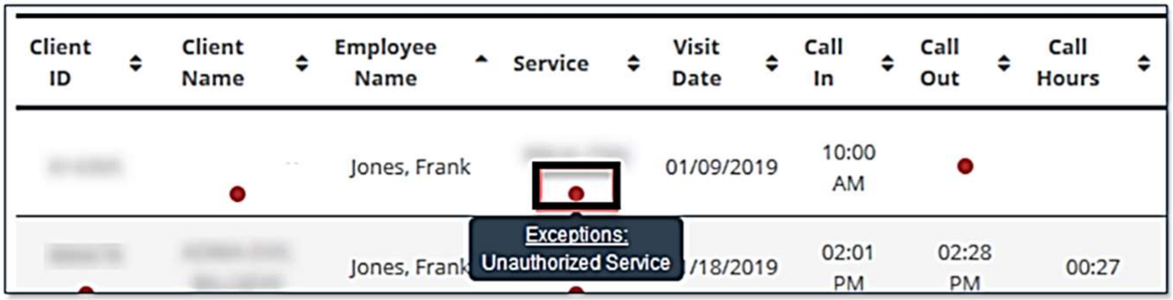
Unauthorized Service Exception

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

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

Unauthorized Service Exception

Click the exception dot under the Service column.



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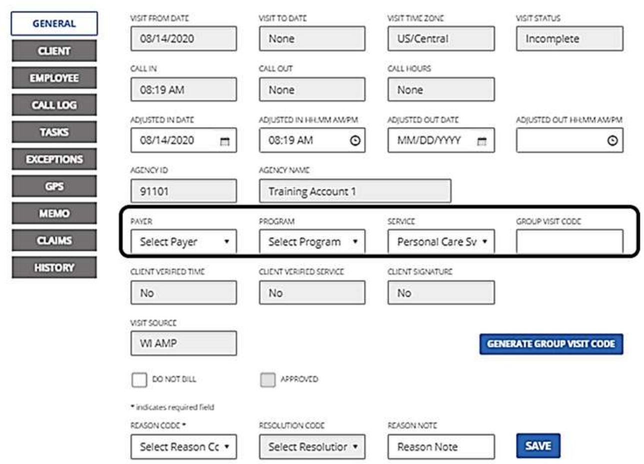
First, you select.

Unauthorized Service Exception

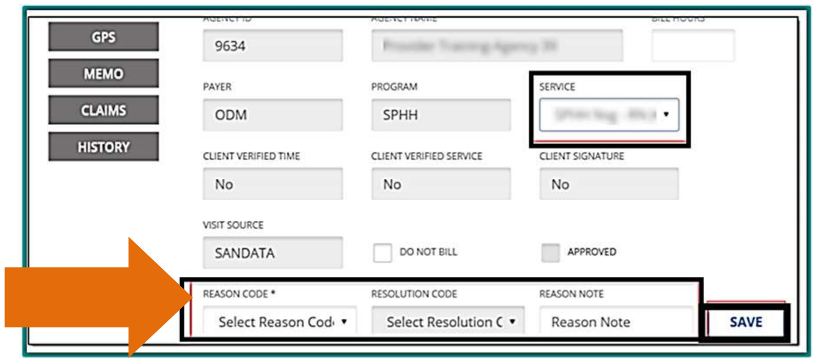
- Select the correct service from the **Service** field drop-down list.
- Select the correct **Payer** from the drop-down list.
- Select the correct **Program** from the drop-down list.



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

Unauthorized Service Exception

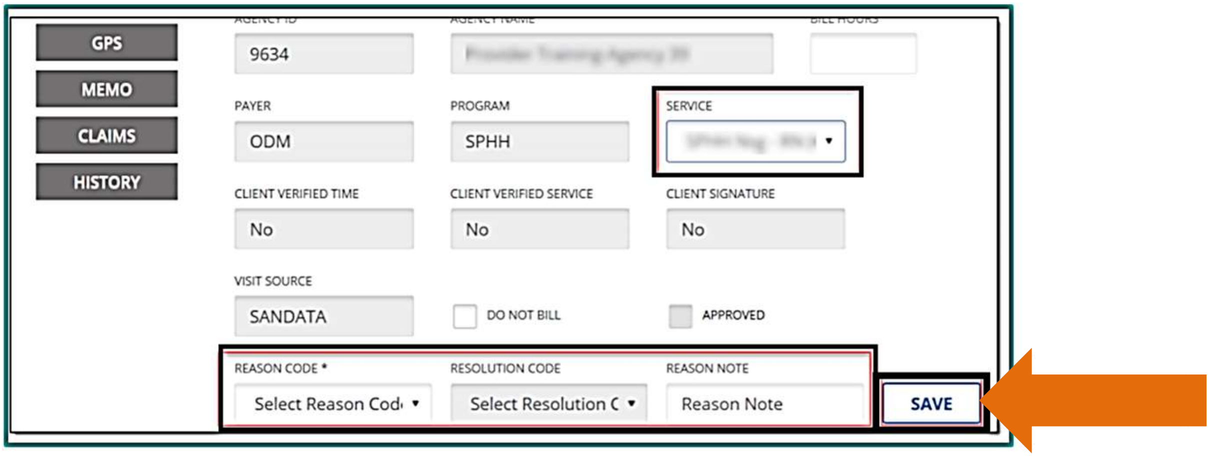
- Select the reason code that best explains why the service was not selected at the time of visit.
- Select the resolution code Written Documentation Maintained.



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

Unauthorized Service Exception

Click Save.



And save.

Unauthorized Service Exception

Tips for preventing unauthorized service exceptions:

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

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Tips for preventing unauthorized service exceptions:

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

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

Unauthorized Service Exception

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

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

Unauthorized Service Exception

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

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

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

Correcting Unmatched Client Phone/ID Exceptions

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

Unmatched Client Phone/ID

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

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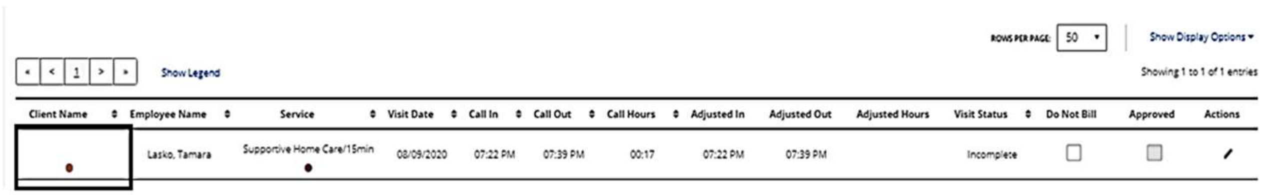
•The Unmatched Client Phone/ID exception shows when the landline phone number the call was made from is not a number listed in the Sandata EVV Portal for the client.
•This exception type must be acknowledged for the visit to be in a verified status.

Unmatched Client Phone/ID

Click the exception dot under the Client Name column.



Select the dot.

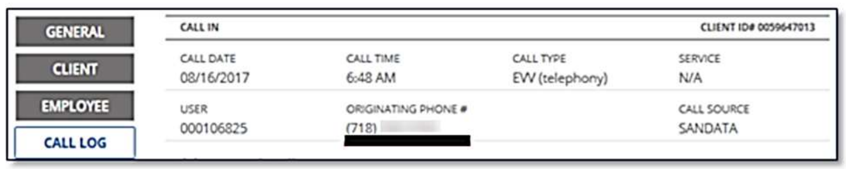
Unmatched Client Phone/ID

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

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

Unmatched Client Phone/ID

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



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

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

Unmatched Client Phone/ID

Tips for preventing Unmatched Client Phone/ID exceptions:

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

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Tips for preventing Unmatched Client Phone/ID exceptions:

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

Unmatched Client Phone/ID

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

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

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

Unmatched Client Phone/ID

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

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

- IRIS consultant
- IRIS Consultant Agency
- IRIS Call Center

Unmatched Client Phone/ID

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

Refer to the Client Data section of the DHS EVV Training website:
www.dhs.wisconsin.gov/evv/training-administrators.htm

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

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

Refer to the Client Data section of the DHS EVV Training website for a video or PowerPoint about how to add a phone number:
www.dhs.wisconsin.gov/evv/training-administrators.htm

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

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

Visit Without Check In/Check Out

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

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

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

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

•There are two ways to handle this exception:

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

Visit Without Check In/Check Out

Tips for preventing missing call in/call out exceptions:

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

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

Merging Calls

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

Merging Calls

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

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

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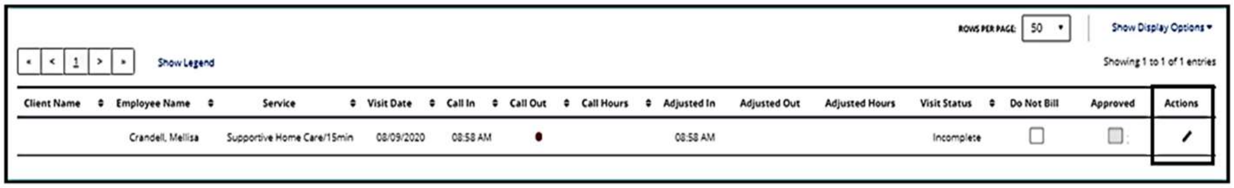
Merging calls is a clever way the Sandata system has of correction an exception.

The Merge Calls button will display only if the system shows several incomplete calls that could merge to provide one complete visit. The incomplete calls have overlapping information, including:
•Same employee ID
•Same date of service
•Same client

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

Merging Calls

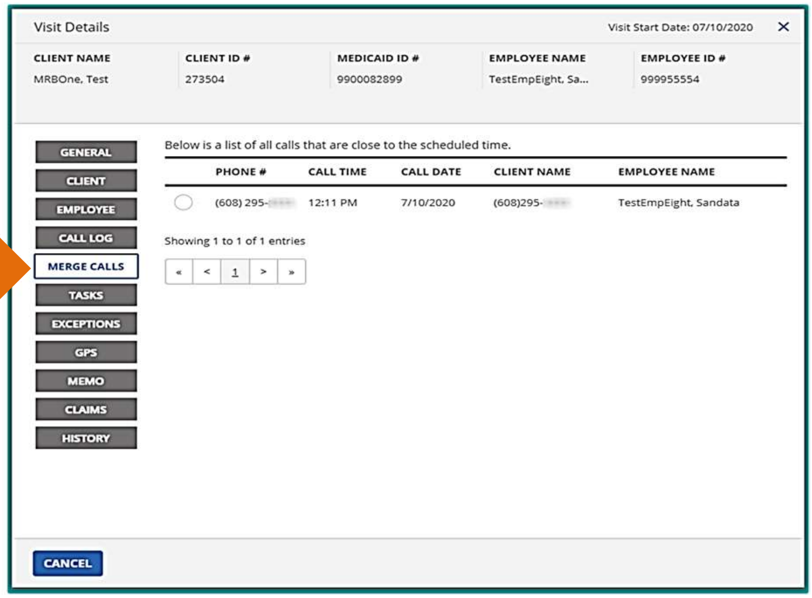
Click the **edit** icon to select client.



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

Merging Calls

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



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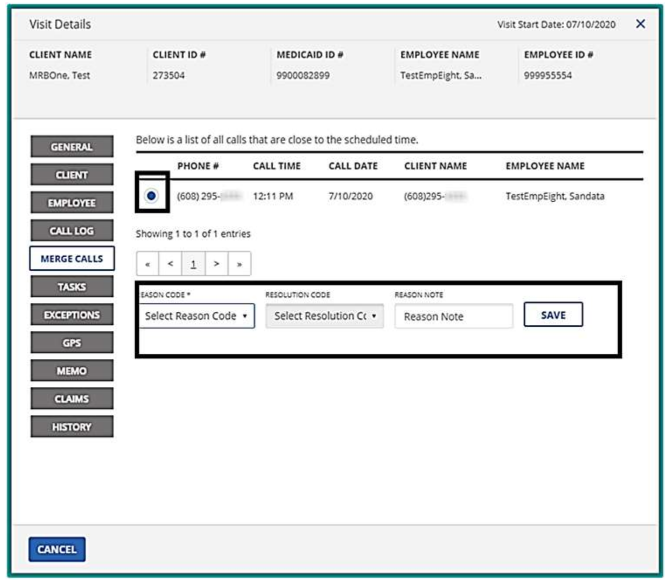
Now you start to correct. When the Visit Details screen opens, you see the “Merge Calls” button is available to use. That’s good news! Click on the Merge Calls button to view other incomplete calls that may be related to this one. Here, one possible match came up.

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

Merging Calls

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

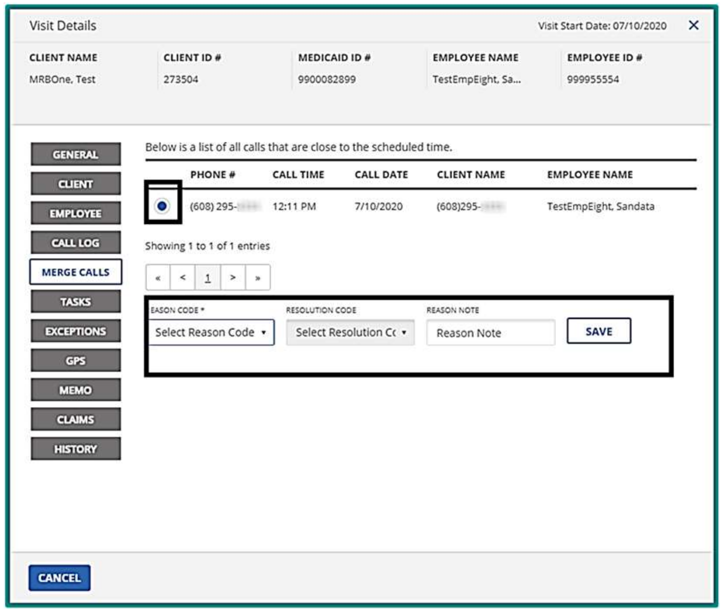


Once you're sure these details are accurate for the visit, select the call to merge it.

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

Merging Calls

Click **Save**.



And click save.

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

Adding a Manual Call

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

Add Manual Call

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

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

Let's look at an example.

Add Manual Call

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

ROWS PER PAGE: 50 | Show Display Options

Show Legend

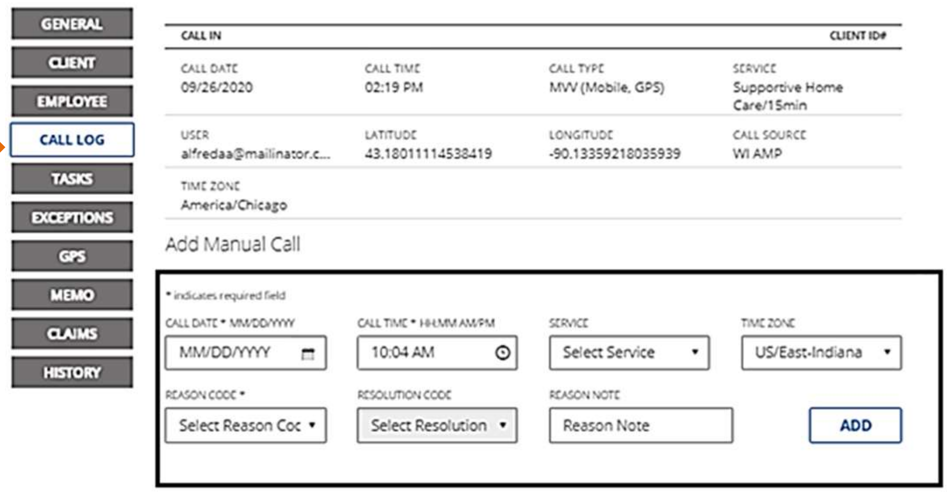
Showing 1 to 1 of 1 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Visit Status	Do Not Bill	Approved	Actions
	Crandell, Mellisa	Supportive Home Care/15min	08/09/2020	08:58 AM	●		08:58 AM			Incomplete	☐	☐	✎

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

Add Manual Call

Click the **Call Log** button.



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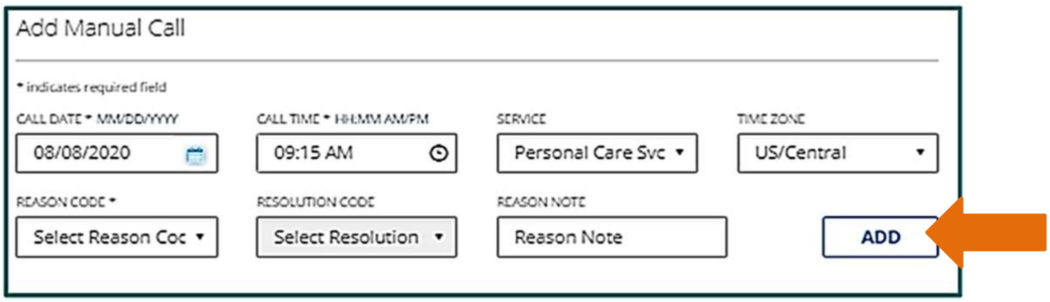
In this example, a Merge Calls button does not appear. There aren't any calls that the system thinks could complete this one, so we'll ask the employee or client for the details, then create the call.

Click on the Call Log button to open that section.

Add Manual Call

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



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

Adjusting a Visit Call In or Call Out

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

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

Adjusting Call In or Call Out

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

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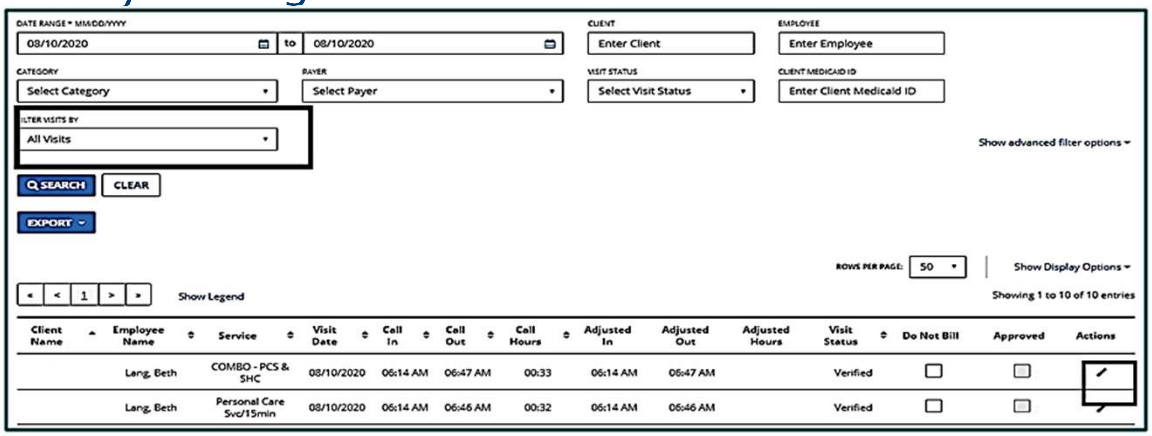
Providers can correct or adjust a call's in or call out time if the employee reports they have captured the EVV visit time incorrectly.

Adjusting call in or call out times can be done on any visit if necessary, including verified visits.
Remember: There is no scheduling component in the DHS-provided Sandata system. A visit that was perfectly submitted but for a timeframe that wasn't according to expectations won't have any exceptions flagged.

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

Adjusting Call In or Call Out

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



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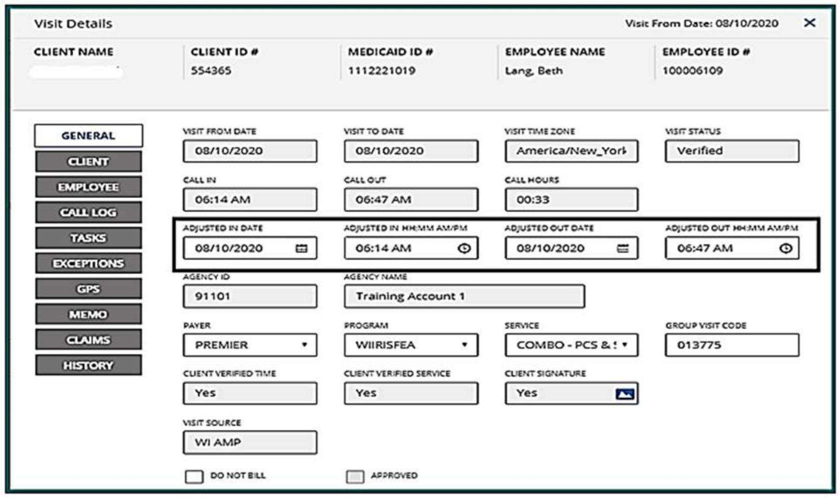
We’ll have to search for the visit in a way that includes visits without exceptions. Remember this starting screen, where you set up all our search parameters? When searching for a specific client visit to adjust, use the “Filter visits by: All Visits” filter. This will include visits that don’t have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

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

Adjusting Call In or Call Out

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



And now you correct.

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

Adjusting Call In or Call Out

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

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

Create Call

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

Create Call

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

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

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

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

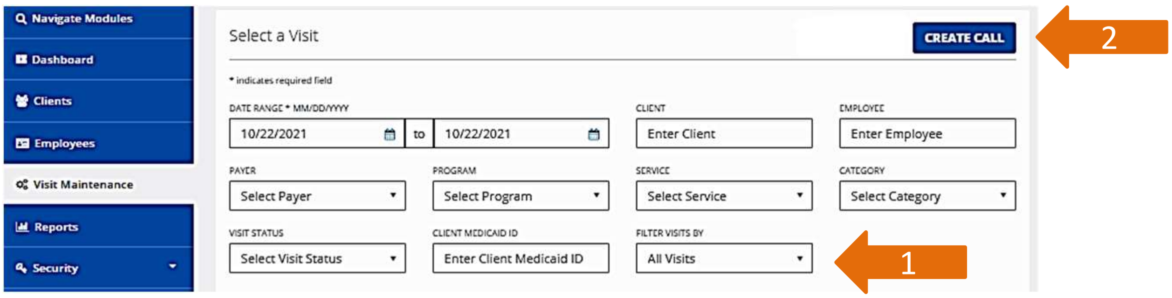
•**Manual Call** is used when a visit exists but is missing a single call in or call out time. We might be able to merge with another incomplete visit, or you may need to add a in or out time.

•**Create Call** is used when an entire visit was not captured by EVV.

Let's take a look.

Create Call

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

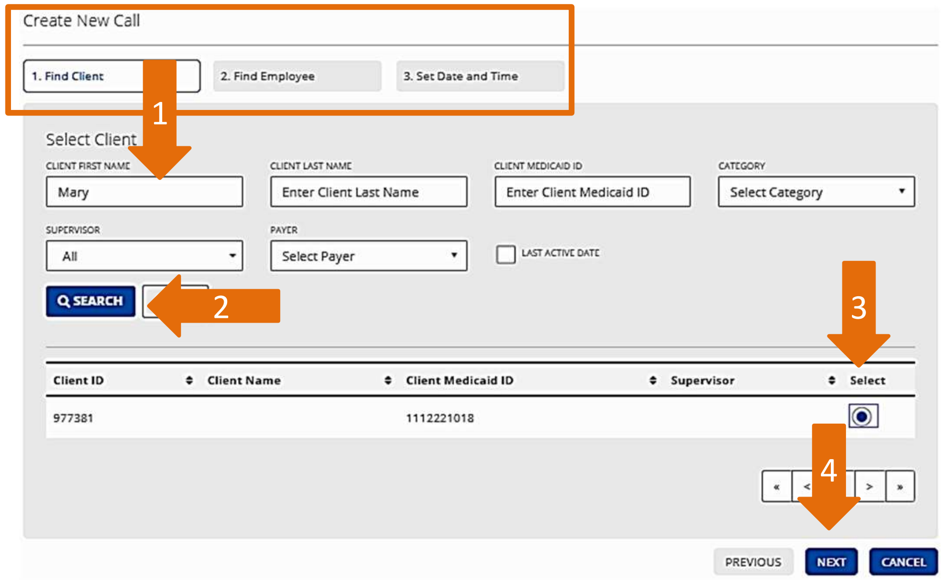


•Before you go through the work of creating an entire visit, confirm the visit is truly missing. Just as we did before, we'll use "All Visits" from the **Filter Visits By** drop down menu. Fill in the other fields—date, client, employee—and perform the search.

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

Create Call

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



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

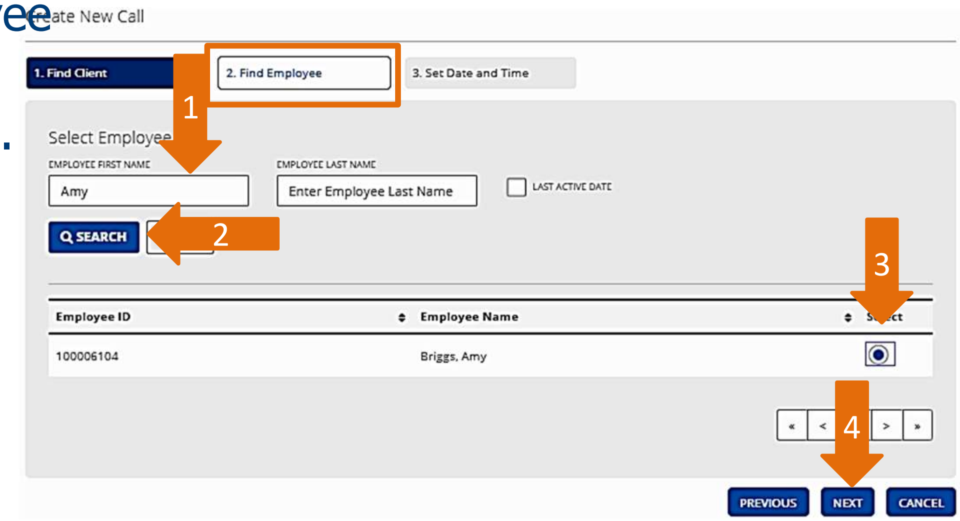
On this first tab, Find Client, we'll move down the screen.

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

First, fill in the client information. It doesn't have to be all the fields—just enough so you're not getting a long list in your results.
Click Search.
In this example, only one client matched the search criteria. Select the client's row.
Then click Next.

Create Call

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



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

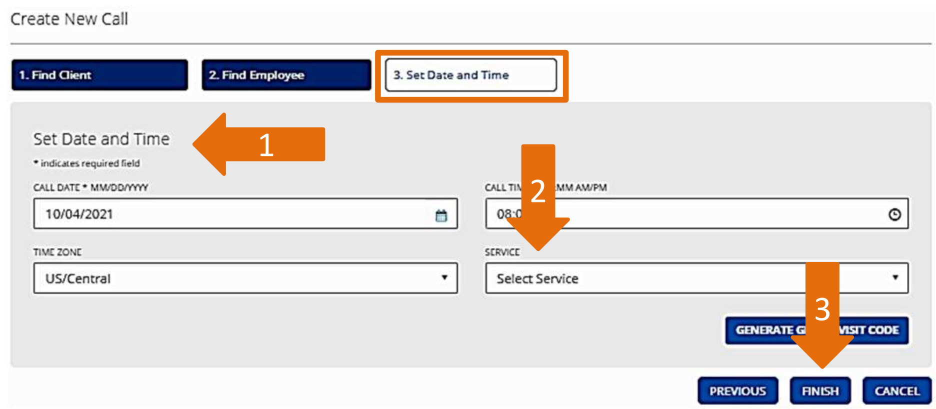
(Note: the arrows will fly in with mouse clicks.)

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

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

Create Call

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



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Now we're on the final tab.

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

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

A confirmation screen will display.

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

Omit Status

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

Omit Status

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

- Robocalls
- Practice calls during training

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

•Robocalls

•Practice calls during training

Omit Status

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

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

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

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

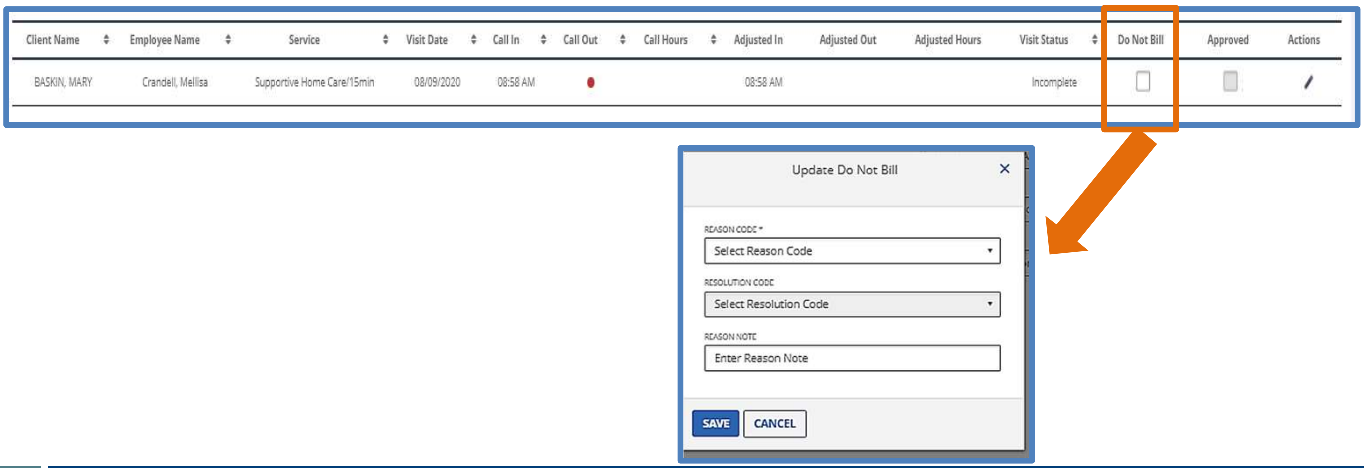
- No employee and client information
- No call out
- No service code

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

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

Setting Omit Status

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



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

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

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

Visit Verification, Client Signature, and Tasks

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

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•Personal care providers should check with their HMOs, MCOs, or IRIS FEA regarding documentation requirements.
•Home health care service providers will not be able to capture record of care within EVV.

Visit Verification, Client Signature, and Tasks

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

Employee Visit Log

PAYER: CAREWIFCP

VISIT							LOCATION IN		LOCATION OUT		EMPLOYEE			CLIENT		
PRG	SRV	DATE	TIME IN	TIME OUT	HOURS	STATUS	LATITUDE, LONGITUDE	PHONE #	LATITUDE, LONGITUDE	PHONE #	NAME	EMPLOYEE ID	SANTRAX ID	NAME	ID / MEDICAID	SIG
WIMCO	T1020	10/22/2021	10:01 PM	10:09 PM	0.13	Verified	46.0703868833380260 , -91.18027638972484		46.07038810531599 , -91.18027991815167		Andrews, Alfreda	100006123	100006123		890163 / 1112221024	N

Task List: 0120,0300,0310

Total Hours: 0.13

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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. 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.

GPS Location

Another topic that is not an exception is GPS.

GPS Location

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

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

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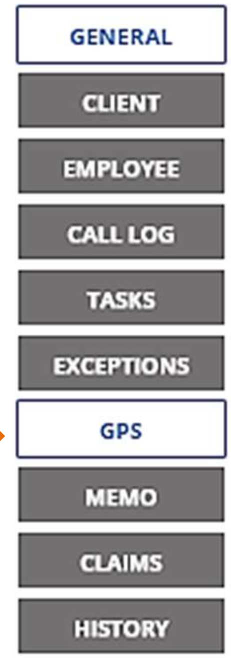
At this time, the GPS location data is informational only:
•GPS captures location information only at the start and end of a visit.
•GPS location data is required but does not prevent the EVV visit from going to a "verified" status.
•GPS data does not currently prevent claims from being paid.

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

GPS Location

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

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



To find GPS location information for a specific visit:
•In Visit Maintenance, click on a visit.
•From the Visit Detail screen, click the **GPS** button to view the location map.

GPS Location

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

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

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

GPS Location

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

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

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•There may be an issue with a building or hill that may make GPS inaccurate.

GPS Location

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

GPS Distance Exception

ACCOUNT: Training Account 4 (81102)
PAYER: CAREWIFCP
PROGRAM: WIMCO

CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	EMPLOYEE ID	EMPLOYEE NAME	EMPLOYEE EMAIL	ACTUAL CALL DATE	ACTUAL CALL TIME	SERVICE	DISTANCE (FT)	CLOSEST CLIENT ADDRESS
890163		1112221024	100006123	Andrews, Alfreda	alfredaa@mailinator.com	10/22/2021	10:09 PM	T1020	1405700	2117 HUEBBE PKWY,Beloit,WI,51511-0000
890163		1112221024	100006123	Andrews, Alfreda	alfredaa@mailinator.com	10/22/2021	10:01 PM	T1020	1405700	2117 HUEBBE PKWY,Beloit,WI,51511-0000

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

Resources

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

Resources

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

Thank You

Thank you for the important services you provide to clients.

WISCONSIN DEPARTMENT of HEALTH SERVICES