

Visit Maintenance: Create Visit



P-02754A (07/2024)

This is for administrators focused on creating a visit. For more info about all visit maintenance functions in the Sandata EVV Portal, see the "Visit maintenance and clearing exceptions in Sandata" section of www.dhs.wisconsin.gov/evv/training-administrators.htm

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

Create Visit

Click on **Visit Maintenance**.




A vertical navigation sidebar for Sandata Home Care. At the top is the logo 'Sandata Home Care' with a hamburger menu icon. Below are several menu items: 'Navigate Modules' with a magnifying glass icon, 'Dashboard' with a grid icon, 'Clients' with a group of people icon and a dropdown arrow, 'Employees' with a person icon, 'Visit Maintenance' with a gear icon and a light blue background, 'Reports' with a bar chart icon, 'Security' with a magnifying glass icon and a dropdown arrow, and 'Online Manual' with a book icon.

Click on Visit Maintenance

Create Visit

Click **Create Visit**.

Select a Visit  **CREATE VISIT** **CREATE CALL**

* indicates required field

DATE RANGE * MM/DD/YYYY to

CLIENT

EMPLOYEE

PAYER

PROGRAM

SERVICE

CATEGORY

VISIT STATUS

CLIENT MEDICAID ID

FILTER VISITS BY

Show advanced filter options ▾

Q SEARCH **CLEAR**

Click Create Visit

Create Visit

Search for the client.

Create New Visit

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

Select Client

CLIENT FIRST NAME CLIENT LAST NAME CLIENT MEDICAID ID CATEGORY

Enter Client First Name Enter Client Last Name Enter Client Medicaid ID Select Category

SUPERVISOR PAYER LAST ACTIVE DATE

All Select Payer

Q SEARCH CLEAR

CANCEL PREVIOUS **NEXT**

The tabs at the top will lead you through the information you'll need to add. First, enter in the client information in the fields you see here. If you leave all the fields empty, all clients will appear. When you've entered the information you need, click "Search."

Create Visit

- Select the client using the button shown here.
- Click **Next**.

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

Select Client

CLIENT FIRST NAME: Jean
CLIENT LAST NAME: grey
CLIENT MEDICAID ID: Enter Client Medicaid ID
CATEGORY: Select Category

SUPERVISOR: All
PAYER: Select Payer
 LAST ACTIVE DATE

SEARCH CLEAR

Sort by Client ID

Client ID	Client Name	Client Medicaid ID	Supervisor	Select
961181	GREY, JEAN	1112221001		<input type="radio"/>

CANCEL PREVIOUS NEXT

More than one client may display, depending on the information you entered for the search. Select the client using the button at the end of the client's row, and click Next.

Create Visit

Search for the employee.

Create New Visit

1. Find Client

2. Find Employee

3. Set Date and Time

Select Employee

EMPLOYEE FIRST NAME

Enter Employee First Name

EMPLOYEE LAST NAME

Enter Employee Last Name

EMPLOYEE ID #

Employee ID #

SANTRAX ID #

Santrax ID #

LAST ACTIVE DATE

SEARCH

CLEAR

CANCEL

PREVIOUS

NEXT

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Next, search for the employee. Enter in the information. If you leave all the fields blank, all employees will be listed. Click Search.

Create Visit

- Select the employee, using the button shown here.
- Click **Next**.

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

Select Employee

EMPLOYEE FIRST NAME EMPLOYEE LAST NAME EMPLOYEE ID # SANTRAX ID #

Enter Employee First Name andrews Employee ID # Santrax ID #

LAST ACTIVE DATE

Q SEARCH CLEAR

Sort by Employee ID

Employee ID	Employee Name	Santrax ID	Select
100006123	Andrews, Alfreda	100006123	<input type="radio"/>

CANCEL PREVIOUS NEXT

More than one employee may display, depending on the information you entered for the search. Select the employee using the button at the end of their row and click Next.

Create Visit

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

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

Set Date and Time

* indicates required field

OVERNIGHT

CALL DATE * MM/DD/YYYY 05/22/2024

CALL IN TIME * HH:MM AM/PM Enter Time

CALL OUT TIME * HH:MM AM/PM Enter Time

HOURS Hours

TIME ZONE US/Central

SERVICE Select Service

REASON CODE * Select Reason Code

RESOLUTION CODE Select Resolution Code

REASON NOTE Reason Note

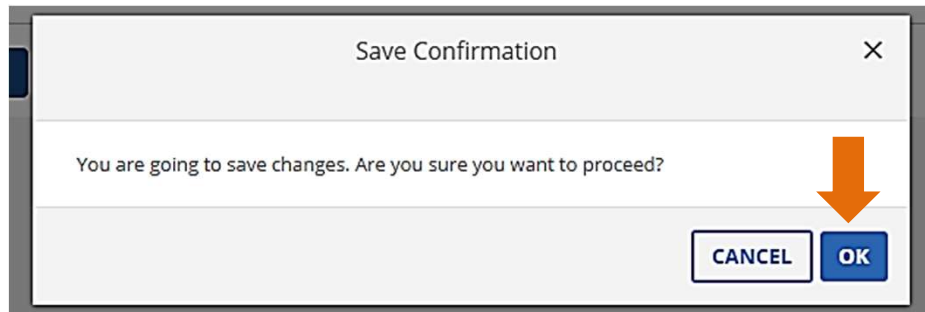
CANCEL PREVIOUS SAVE & ADD ANOTHER ADD

Enter the remaining information, the date and time of the visit, including 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, marked here with an arrow. This will let you enter a call out date that is different from the call in date.

Create Visit

A confirmation box will appear. Click **OK**.



A confirmation box will appear. Click OK.

Resources

Resources

- Wisconsin EVV Customer Care
- Provider and independent nurse information
- Training resources for admins, independent nurses, and workers
- Resources, including ForwardHealth Updates and FAQs

www.dhs.wisconsin.gov/evv/index.htm

The screenshot shows the Wisconsin Department of Health Services' EVV website. The navigation menu at the top includes: About DHS, Data & Statistics, Diversity & Conditions, Health Care & Compliance, Long-Term Care & Support, Prevention & Healthy Living, Partners & Providers, and Certification, Licenses & Permits. The main content area is titled 'Electronic Visit Verification (EVV)'. It features a 'What is EVV?' section explaining the technology, a 'Stay up to date' section with 'Key Conversations' and 'Administrative Training for Providers and Independent Nurses New to EVV', and a 'What programs are required to use an EVV system?' section listing Personal care and supportive home care services (PCS), Medicaid and BadgerCare Plus fee-for-service (ForwardHealth card), and BadgerCare Plus and Medicaid SSI HMOs. A dark blue box on the left contains contact information for EVV Customer Care, and a light blue box on the right contains information about upcoming opportunities.

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Now let's take a quick look at the EVV home page. Here, and on every EVV webpage, you'll see the contact information for EVV Customer Care in the dark blue box. If you've not signed up for EVV emails, every EVV webpage has the link for you. There's also information about upcoming opportunities in the light blue box.

On the left of each page is the navigation tabs. Let's take a look at a few of these.

Providers and independent nurses will find information at www.dhs.wisconsin.gov/evv/providers.htm

Providers (including independent nurses) and workers can find helpful training resources at www.dhs.wisconsin.gov/evv/training.htm,

There are separate sections for administrator, independent nurse, and worker materials. If you're a video kind of person, there are videos available. If you're more of a reader, printable materials are here, too. And if you're looking for PowerPoints to present in a larger group, those are also available. Choose the kind of learning that works for your situation.

Our Resources section has great information. FAQs are there, as well as ForwardHealth Updates: www.dhs.wisconsin.gov/evv/news.htm

Thank You

Thank you for the important services you provide to members.

