

# Visit Maintenance: Create Visit



P-02754A (01/2025)

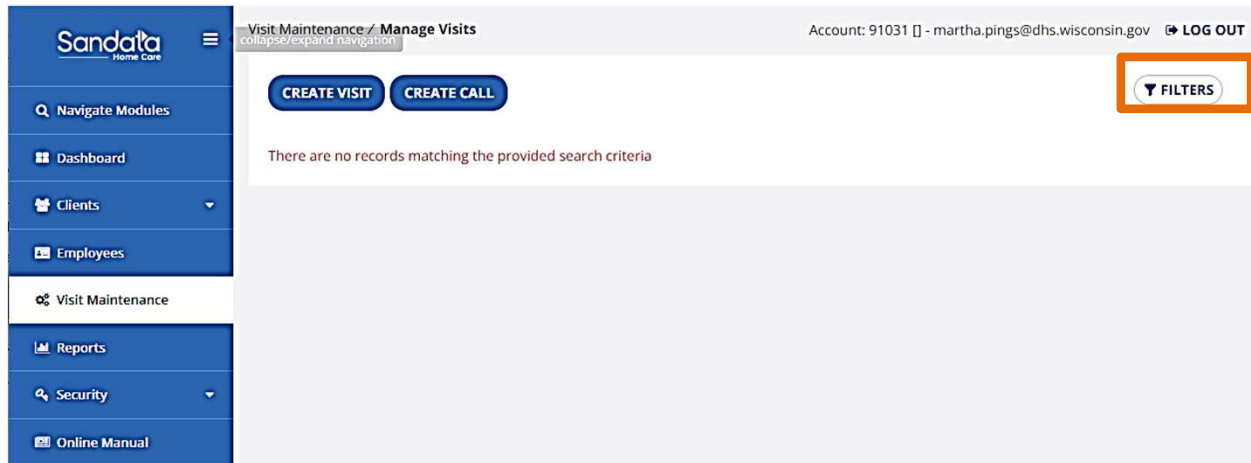
This is for administrators focused on creating a visit. For more info about all visit maintenance functions in the Sandata EVV Portal, see the "Visit maintenance and clearing exceptions in Sandata" section of [www.dhs.wisconsin.gov/evv/training-administrators.htm](http://www.dhs.wisconsin.gov/evv/training-administrators.htm)

# 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

Use the “Filters” option to view visits.



Go to the Visit Maintenance section. It's best to start with Filters (upper right corner), 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** [X]

From Date \* 12/18/2024 [calendar icon]

To Date \* 12/18/2024 [calendar icon]

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

CLEAR

RESET

**APPLY FILTERS**

SAVE SETTINGS

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).

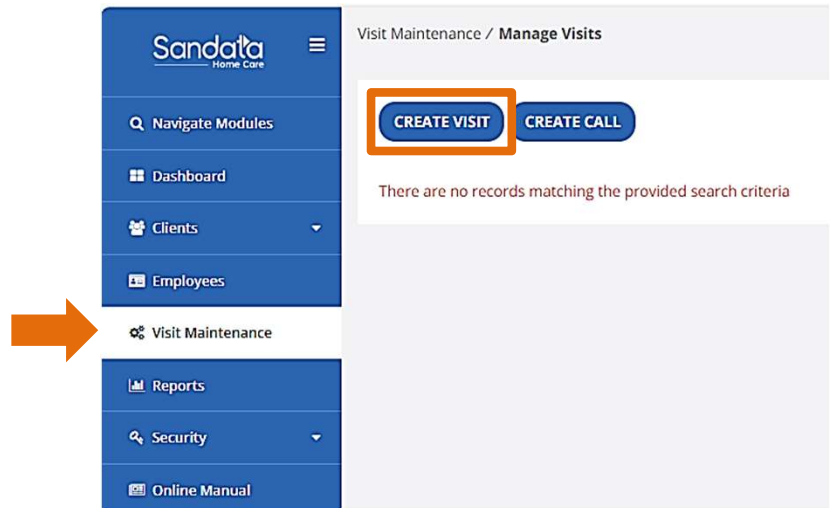
Filter Visits By should be set to "All Visits."

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 NEXT

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"/>

6

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 a three-step process for creating a visit. Step 1, 'Find Client', is on the left with a 'CANCEL' button and the text 'No search performed yet'. Step 2, 'Find Employee', is highlighted with an orange box and contains a 'CANCEL' button. Step 3, 'Set Date and Time', is on the right with 'PREVIOUS' and 'NEXT' buttons. A 'Filters' modal is open over Step 2, containing input fields for 'Employee First Name', 'Employee Last Name', 'Employee ID', and 'Santrax ID', along with 'CLEAR' and 'APPLY FILTERS' buttons. An orange arrow points from the 'FILTERS' button in the modal to the 'PREVIOUS' button in Step 3.

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"/>

8

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

10

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.

# 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](http://www.dhs.wisconsin.gov/evv/index.htm)

WISCONSIN DEPARTMENT of HEALTH SERVICES

Home Partners & Providers Electronic Visit Verification Electronic Visit Verification (EVV)

EVV: Home

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Training

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Contact Us

**Stay connected**

Join our email list  
Sign up to receive email notices about EVV in Wisconsin.

Have questions? Need help?  
Wisconsin EVV Customer Care is available at 833-931-2035 or [evv@wisconsin.gov](mailto:evv@wisconsin.gov) Monday-Friday, 7 a.m.-6 p.m. Central Time.

### Electronic Visit Verification (EVV)

#### What is EVV?

EVV uses technology to make sure that members and participants receive the services they need. Workers check in at the beginning and check out at the end of each visit, using a smart phone or tablet, small digital device, or landline telephone. The EVV system captures six key pieces of information:

- Who receives the service
- Who provides the service
- What service is provided
- Where the service is provided
- The date of service
- The time the service begins and ends

Here is the [list of personal care services and home health care services codes](#) that require workers to capture EVV information in Wisconsin.

EVV systems are secure and compliant with the Health Insurance Portability and Accountability Act (HIPAA).

#### What programs are required to use an EVV system?

- Personal care and supportive home care services (PCS)
  - Medicaid and BadgerCare Plus fee-for-service (ForwardHealth card)
  - BadgerCare Plus and Medicaid SSI HMOs

Stay  
Join Ke  
month  
EVV sp  
answer  
July 15  
551-28  
August  
551-28  
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Indep  
Compl  
Trainin  
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Provid  
These  
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Ne  
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is no lo

12

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.

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](http://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](http://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 quick fact sheets: [www.dhs.wisconsin.gov/evv/resources.htm](http://www.dhs.wisconsin.gov/evv/resources.htm)

# Thank You

Thank you for the important services you provide to members.



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of HEALTH SERVICES