Visit Maintenance: Creating a Call

WISCONSIN DEPARTMENT of HEALTH SERVICES

P-02754N (01/2025)

This is for administrators focused on adding a single call in to start 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

Creating a Call

Creating a call is different from adding a manual call or creating an entire visit. Let’s take a look.

Create Call

Difference between Create Call, Manual Call, and Create Visit:

- **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.

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

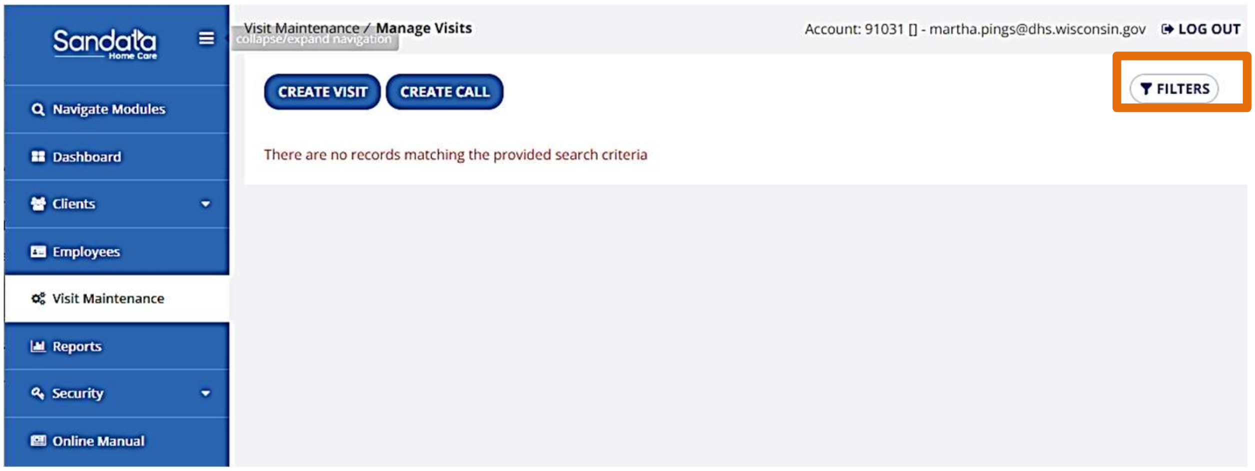
•**Create Call** has limited use. It is used when a visit is in progress, and only an in call needs to be created. Maybe the employee called the provider at the start of the visit because they could not use the usual check in method. We'll go over "Create Call" in this section of slides.

•**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.

Create Call

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



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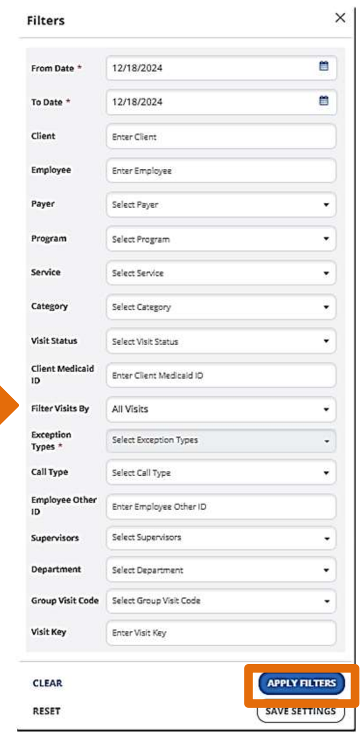
It’s best to start with Filters to look for the visit, so you can make sure the call is truly missing and you’re not creating a duplicate.

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.



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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).

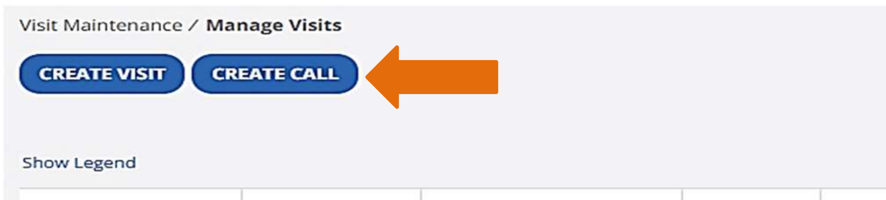
Filter Visits By should be set to "All Visits."

Click "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**.

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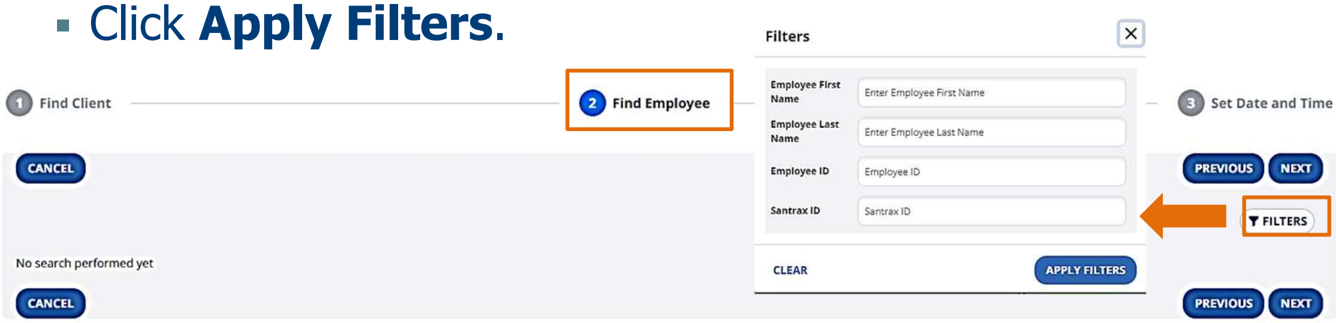
The numbered steps tabs at the top will automatically lead you through the information you'll need to add.
First, find the client. You can scroll down the list of all clients or use the Filters feature to shorten the list to one client's name.
Second, select the client using the Actions button on the right.
Third, click Next.

Create Call

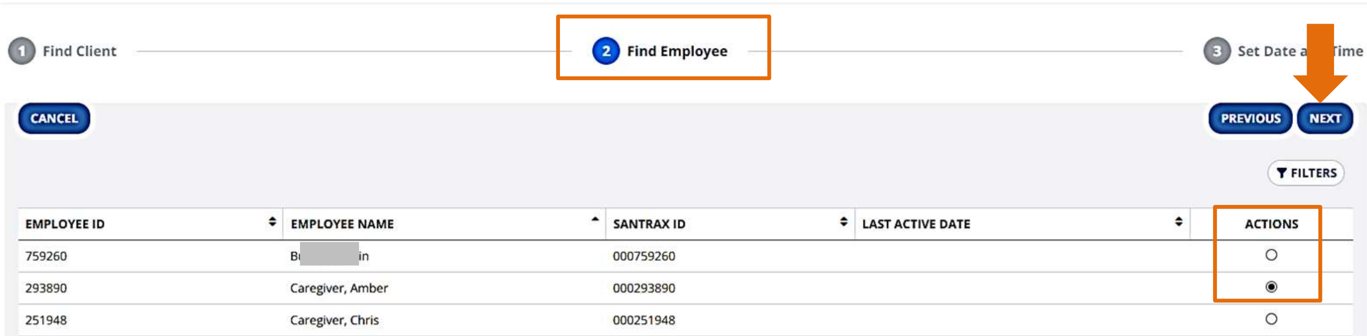
- On the **Find Employee** screen, open the **Filters**.
- Enter the employee’s name or leave blank for a list of all employees.
- Click **Apply Filters**.



The 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

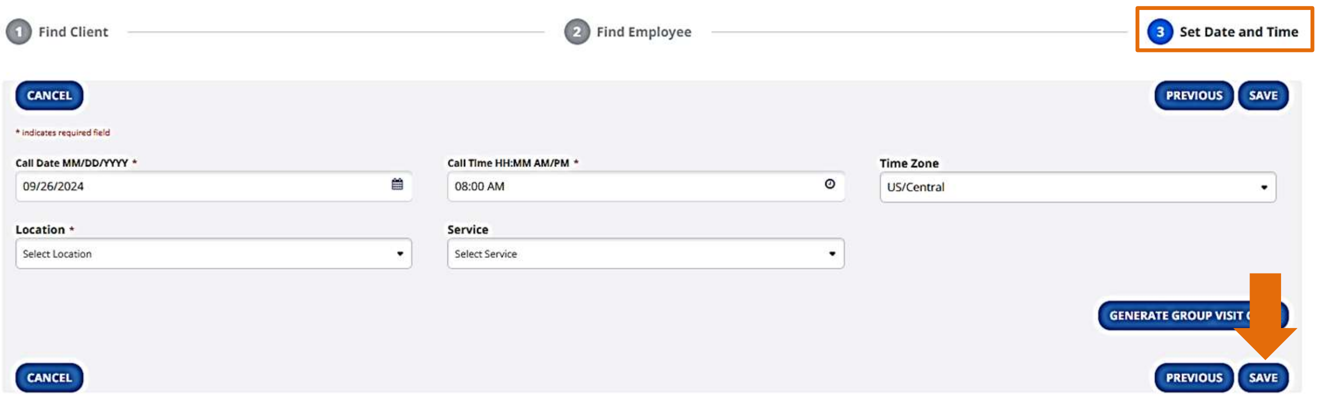
- Select the employee, using the **Actions** button on the right.
- Click **Next.**



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.**



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	☐		
						Total: 00:00							

25 of 1 entries

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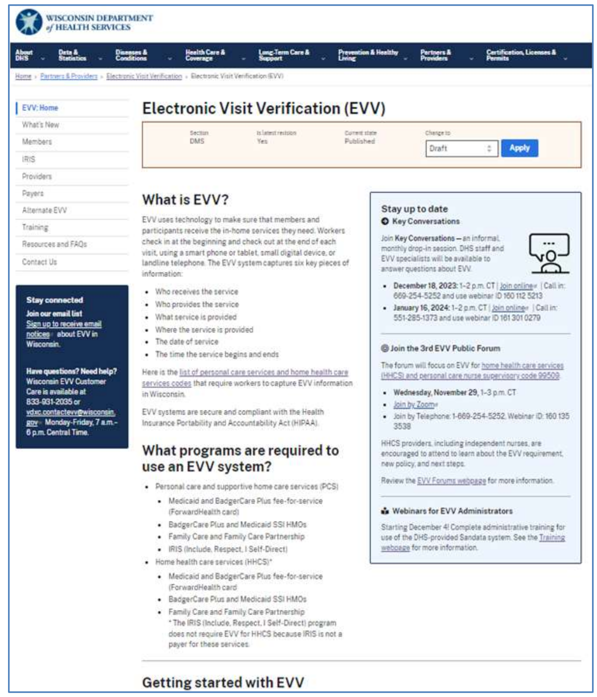
Notice that the "Visit Status" column shows the visit is "In Process."
Since only a call in was created, the visit will show an exception in the Call Out column until the visit is ended.

Resources

Webpage Tour

- EVV Customer Care
- Service codes in soft/hard launch
- Provider information
- Training resources for admins and workers
- Resources, including ForwardHealth Updates and FAQs



Now let's take a quick look at our Webpage tour: **(switch to displaying website to click to the locations)**

Let's start at the EVV home page. Here, and on every EVV webpage, you'll see the contact information for EVV Customer Care. 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 upper right box.

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

We know there are questions about the which service codes will need EVV. You can find those codes, and see which are in soft launch or hard launch, at www.dhs.wisconsin.gov/evv/programadmin.htm

Providers will find information, including a to-do list to keep on track, at www.dhs.wisconsin.gov/evv/providers.htm

Providers and workers can find helpful training resources at www.dhs.wisconsin.gov/evv/training.htm,
The webinar list is on this page, as well as separate sections for admin 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.

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