

Visit Maintenance: Adjusting a Visit Call In or Call Out



P-027540 (01/2025)

This is for administrators focused on correcting a visit with a missing call in or call out exception by adding a manual call. 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

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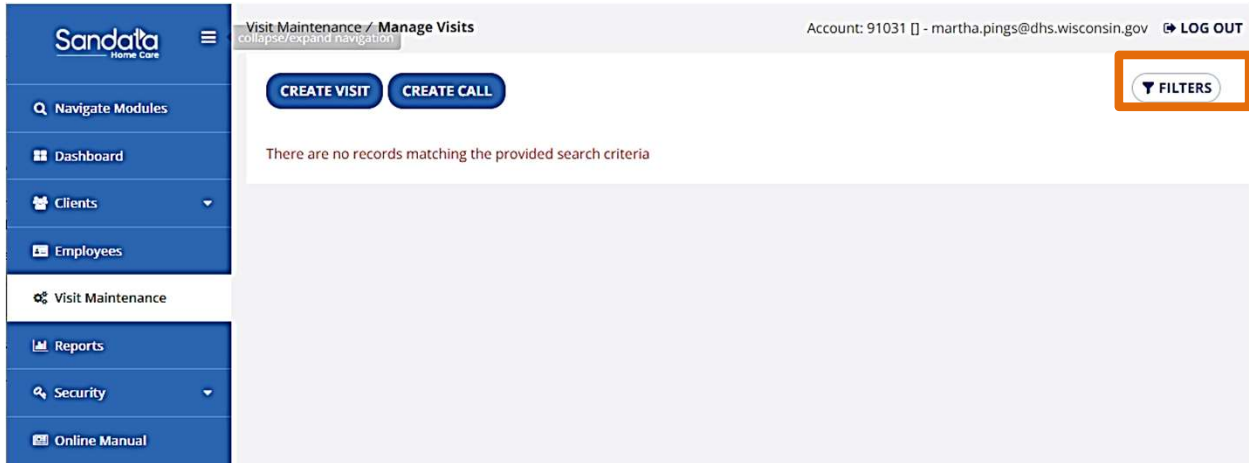
Adjusting call in or call out times can be done on any visit if necessary, including verified visits.

Remember: There is no scheduling component in the DHS-provided Sandata system. A visit that was perfectly submitted but for a timeframe that wasn't according to expectations won't have any exceptions flagged.

For many of our examples so far, we've had exceptions to show us what visits needed attention. How will you find a visit that has inaccurate time, but is considered complete and has no exceptions?


Adjusting Call In or Call Out

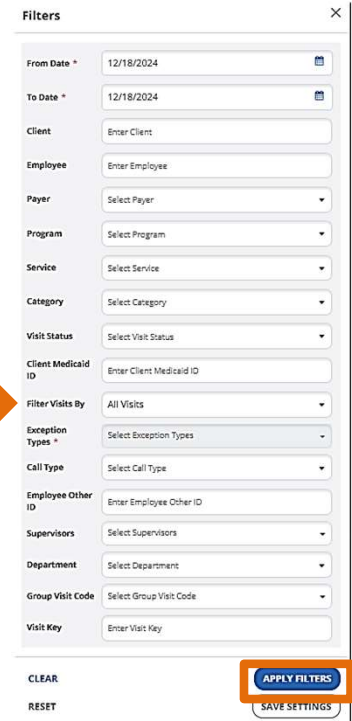
Use the "Filters" option to view visits.



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

Adjusting Call In or Call Out

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



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Use the drop-down menus in each field to filter the visit search. Fill in the fields desired – by date range, client name, employee name, or other information. You can keep some fields blank.

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

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

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

Click “Apply Filters” when you are ready.

Adjusting Call In or Call Out

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

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

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

Adjusting Call In or Call Out

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

The screenshot shows a software interface with a top navigation bar containing the following tabs: General, Client, Employee, Call Log, Tasks, Exceptions, GPS, Memo, Claims, and History. The 'General' tab is selected and highlighted with an orange border. Below the navigation bar, there are several input fields for call log information:

Visit From Date 11/17/2023	Visit To Date 11/17/2023	Visit Time Zone America/Chicago	Visit Status Verified
Call In 10:02 AM	Call Out 10:27 AM	Call Hours 00:25	Units None
Adjusted In Date 11/17/2023	Adjusted In 10:02 AM	Adjusted Out Date 11/17/2023	Adjusted Out 10:27 AM

The bottom row of fields, including 'Adjusted In Date', 'Adjusted In', 'Adjusted Out Date', and 'Adjusted Out', is highlighted with a thick orange border. Each of these fields has a small calendar icon to its right.

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And now you can correct.

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

Adjusting Call In or Call Out

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

* indicates required field

Reason Code * Select Reason Code <small>Reason Code is required.</small>	Resolution Code * Select Resolution Code	Reason Note Enter Reason Note	 SAVE
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As usual when there are edits, the reason and resolution fields will display. Use the drop-down menus to enter the required information.

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

Then click Save.

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

WISCONSIN DEPARTMENT OF HEALTH SERVICES

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

EVV: Home

What's New

Members

IRIS

Providers and Independent Nurses

Payers

Alternate EVV

Training

Resources and FAQs

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 vdxc.con@dnrc.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

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Join our email list
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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.

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 quick fact sheets: www.dhs.wisconsin.gov/evv/resources.htm

Thank You

Thank you for the important services you provide to members.

