

Electronic Visit Verification: Group Visits

November 2023
Wisconsin EVV



P-02755 (12/2023)

Welcome to the training for Sandata Electronic Visit Verification
Group Visits

Objectives

- Understand what a group visit is and when it is allowed.
- Learn how to start and end a group visit using Sandata Mobile Connect (SMC).
- Learn how to start and end a group visit using telephonic visit verification (TVV).
- Understand how and when to abandon a Group Visit (SMC).

Key Terminology

- Client – A member/participant who receives services through Wisconsin Medicaid
- Employee – A person (worker) who provides care to one or more clients
- Santrax ID – The unique worker number issued by the ForwardHealth Portal
- Visit – An in-person service to a client in a home or community-based setting

3

Let's walk through some of the key terms that we will mention today.

A "client" in the Sandata EVV system is frequently called a "member" or "participant" in Wisconsin's service delivery.

"Employee" is the term used for a worker in the Sandata EVV Portal, and "worker" is used by the Wisconsin Department of Health Services (DHS). We will be using employee for training purposes.

Santrax ID—The unique worker number issued by the ForwardHealth Portal and used in Sandata

Visit—An in-person service to a client in a home or community-based setting

Group Visit

- Group visits allow a single employee to provide services to multiple individuals in the same location without having to check in and out multiple times.
- If more than one employee is involved, each employee should start their own group visit.

Group visits allow an employee to provide services to multiple individuals in the same location without having to check in/out multiple times.

If there is more than one employee visiting a group of clients at the same time, each employee will start their own group visit.

Group Visit

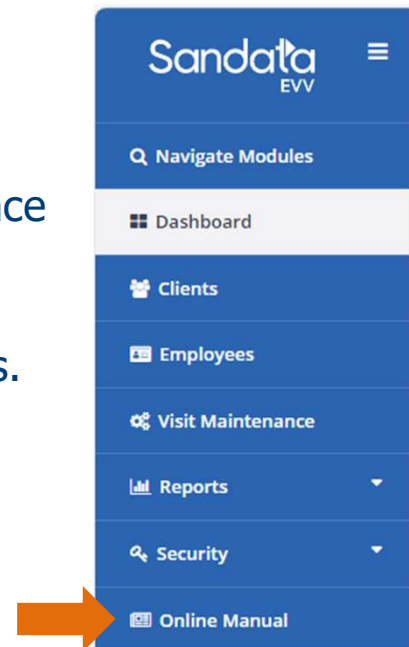
- An employee may capture a visit as a group visit when all of the following are true:
 - The employee is providing services to multiple clients in a single visit.
 - The clients are at the same location.
 - SMC or TVV is used.
- Fixed visit verification devices are assigned to only one client and need to be used separately for each client in the group.

An employee may capture a visit as a group visit when all of the following are true:
The employee is providing services to multiple clients in a single visit.
The clients are at the same location.
SMC or TVV is used.
Fixed visit verification devices are assigned to only one client and need to be used separately for each client in the group.

Group Visit

A Sandata EVV Portal user can also create a group visit manually using the Visit Maintenance module:

- This is not necessary for Wisconsin Department of Health Services requirements.
- If a provider finds it serves a business purpose, step-by-step instructions can be found within the Group Visit section of the Sandata Online Manual.



6

A Sandata EVV Portal administrative user can also create a group visit manually in the Visit Maintenance module:

- This is not necessary for Wisconsin Department of Health Services requirements. We won't be delving into this today as a result. Our focus will be on how the employee captures the group visit.
- If a provider finds it serves a business purpose, step-by-step instructions can be found within the Group Visit section of the Sandata Online Manual.

Sandata's online manual is found on the left-hand side at tabs in the Sandata Portal.

Worker Visit Card



| 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 |

Wisconsin Electronic Visit Verification
WORKER VISIT CARD
Wisconsin EVV Customer Care
833-931-2035 | vdx.contactevv@wisconsin.gov | Monday - Friday 7am-6pm

Agency's Sandata toll-free number: _____

Agency/Company ID: 2- _____

Worker Santrax ID: _____

Sandata Mobile Connect Username: _____

Client Identifier: _____

Service Code(s) : _____

Is recording tasks within EVV required? __Yes __No

P-02844A (10/2023)

www.dhs.wisconsin.gov/library/p-02844.htm

7

We'll start with a tip!! The worker ID card is one of the best tools we have for you. It's available on the DHS EVV website to print out and includes space for all the information an employee needs. The provider can supply the information on the left side of this card. (Independent nurses, as an "agency of one," you can provide this to yourselves!) The information includes:

- The toll-free phone number for TVV
- The agency or company ID assigned by Sandata
- Your Santrax ID to identify you as the employee
- Your Sandata Mobile Connect username, which is simply your email address
- The client ID from Sandata
- The service codes for the care you are providing

The QR code on the slide will take you to this tool. To use the QR code, open up the camera on your cell phone. Hover the camera over the QR code on the slide. A link should appear; tap it, and it will bring you directly to that webpage.

One last item to point out is the question on the bottom: "Is recording tasks within EVV required? Yes or No." The provider should let the employees know this answer. Let's go to the next slide for more information.

Task ID List

| Task ID | Task Description | Task ID | Task Description |
|---------|------------------------------|---------|----------------------------------|
| 100 | Shower/Bathing | 105 | Dressing/Change |
| 110 | Prosthetics/splints/TEDS | 115 | Grooming |
| 120 | Assist w/Feeding | 125 | Mobility |
| 130 | Transferring | 135 | Toileting |
| 200 | Bowel Program (MOT) | 205 | Catheter Site Care (MOT) |
| 210 | Complex Positioning (MOT) | 215 | Feeding Tube Site Care (MOT) |
| 220 | Glucometer (MOT) | 225 | Medications: Assist/Remind (MOT) |
| 230 | Range of Motion (MOT) | 235 | Respiratory Assistance (MOT) |
| 240 | Skin Care (MOT) | 245 | Tube Feeding (MOT) |
| 250 | Vital Signs (MOT) | 255 | Wound Care (MOT) |
| 300 | Eyeglass/Hearing Aid(s) Care | 305 | Housekeeping |
| 310 | Laundry | 315 | Meal/Purchase Groceries |

MOT = Medically Oriented Task

8

This **task ID list** is a great job aid if your provider requires tasks to be entered using EVV. Notice that these are very specific tasks that may happen during a visit—helping with a shower, transferring, toileting. They are not the broad “services” we saw on the previous slide.

Everyone using EVV will enter the broad service category from the last slide for the visit. Some employees will use EVV to enter the tasks listed here, too. Please note—the number listed next to each task is entered if you use TVV.

Providers: let your employees know if you require tasks to be included in EVV. For some providers, it provides the record of care. If you are not using EVV for the record of care, entering tasks like these is not required.

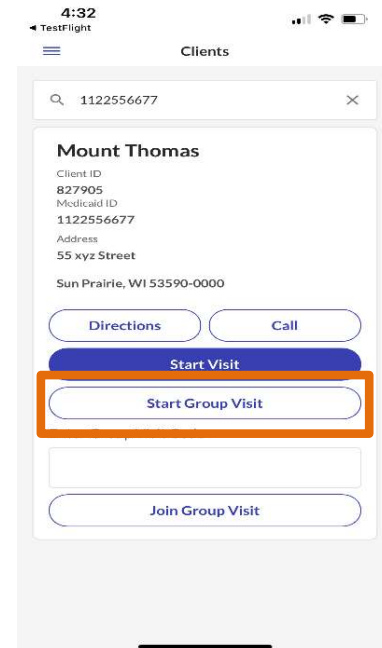
SMC: Starting a Group Visit

For providers, the remaining portion of this session may be helpful for training employees who will need to use the Group Visit feature. This PowerPoint is on the DHS EVV training webpage.

Group Visit Option

A group visit allows a single employee to provide services in a group setting to multiple clients without having to check in and check out for each:

- Enter the first client's information as usual.
- Tap **Start Group Visit**.



10

Your provider will tell you if you're able to use a group visit. If you are providing services to multiple clients in a single visit in the same location, and they have the same program payer and provider, you can Start a Group Visit.

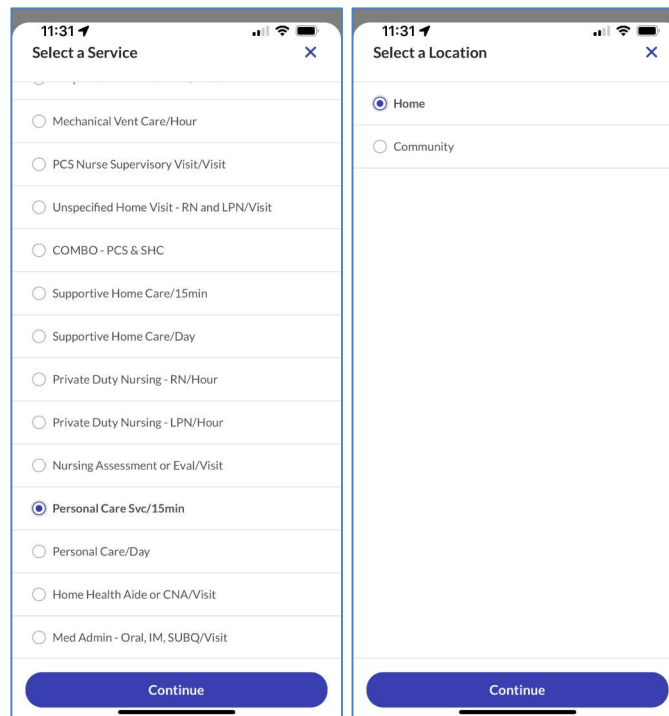
Start just as you would any other visit: log in and enter the first client's information. This screen is where you would select Start Group Visit.

This gives you a visit foundation on which to add more clients.

Note the final option on the screen, Join Group Visit, is not used in Wisconsin to capture EVV visits.

Group Visit Option

- Select Service type and tap **Continue**.
- Select a Location and tap **Continue**.



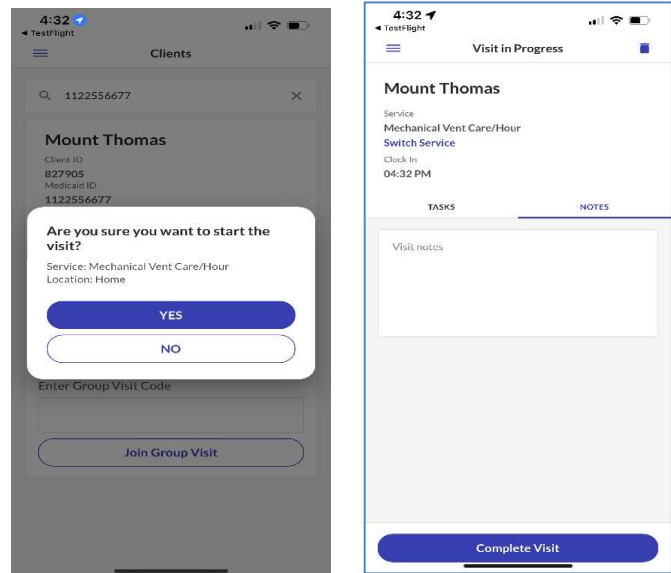
11

After starting the Group Visit, you'll be asked to Select a Service. Select the service type and tap **Continue**.

Then you'll need to select a location, Home or Community, and tap **Continue**.

Group Visit Option

- Tap **Yes** to start the group visit.



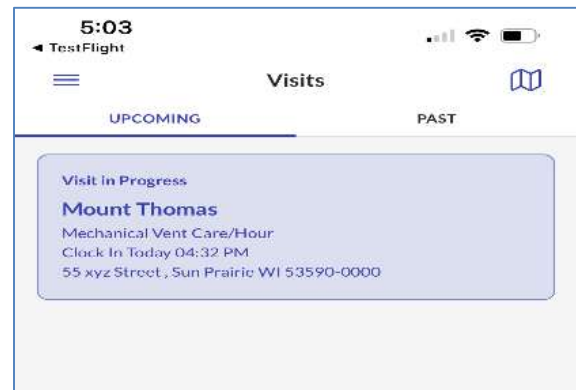
12

Next, you'll tap Yes to start a group visit.

Then you see the familiar screen on the right, showing the first client is entered.

Group Visit Option

- Using the menu, go to Visits.
- Select the Upcoming tab.
- Tap the Visit in Progress.



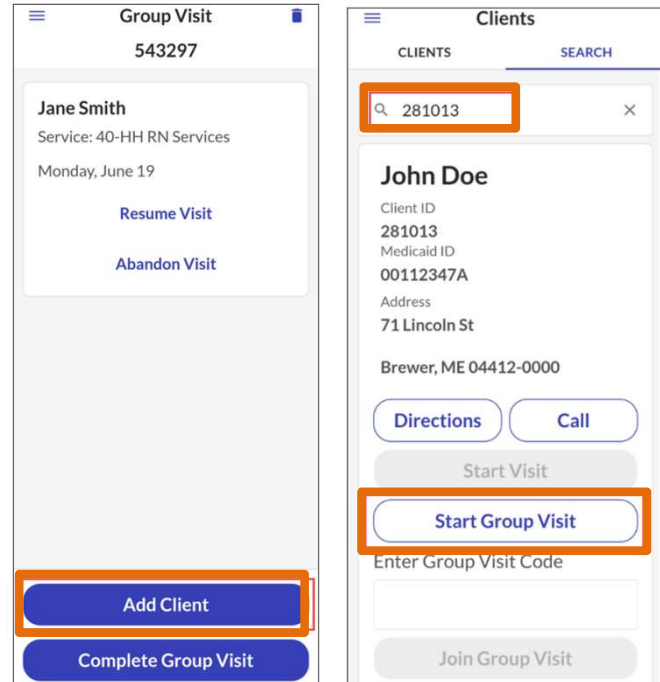
13

To continue, you need to use that foundation as your base:

- In the menu, go to Visits.
- Select Upcoming tab. You'll see that foundation visit you first set up.
- Tap on that visit in progress to open it up.

Group Visit Option

- Select **Add Client**.
- Type in the next client's Medicaid ID.
- Select **Start Group Visit**.
- Select the client's service code and location, as usual.
- Repeat for other clients.



14

From there, you can add clients one at a time:

- Select Add Client.
- Type in the next client's Medicaid ID, as usual.
- Select Start Group Visit.

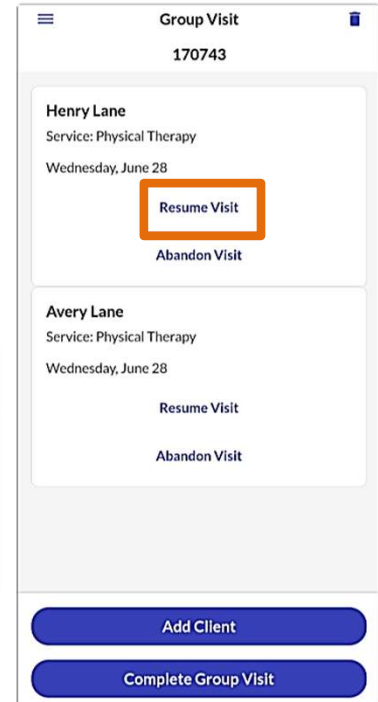
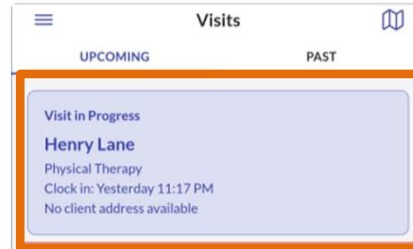
The screens we're already familiar with, to add the service and location (home or community), will be displayed next.

You can keep going back to this Visit in the menu to add as many clients as needed. New clients can be added at any time during the visit.

Group Visit Option

Ending the Group Visit can be done one client at a time or as a whole group:

- Tap on the visit.
- Select **Resume Visit** for one client at a time or **Complete Group Visit** for all clients.



15

Ending a group visit can happen one-by-one or all at once. It starts out just as you would expect:

From the menu, select Visits, and the Upcoming tab. Tap on the visit. Each client will be displayed.

To end the visit one client at a time:

- Resume Visit means you'll resume gathering the end data for this client.
- Abandon visit cancels that visit for the client. You'll need to let your provider agency administrator know, so they can make corrections in the Sandata Portal.

To end all the clients' visits at the same time, select Complete Group Visit at the bottom of the screen.

Either way, you can expect the same familiar screens as ending any other visit.

TVV Group Visits

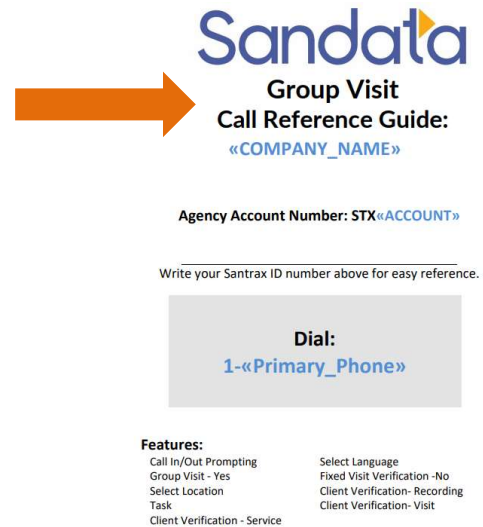
Let's switch now to the second way for a worker to record a group visit.

The TVV method requires using the client's valid and verifiable landline or voice over internet phone (VOiP), for example-- a phone line provided by a cable company.

Sandata's TVV system is referred to as Santrax. Employees will hear "Welcome to Santrax" when they call in—it's good to know they've reached the correct number.

TVV Group Visits Information Needed

- Use the Santrax Call Reference Guides included in Sandata Welcome Kit.
- For Group Visits, reference Call Reference Guide with the "Group Visit-Yes" feature.



The graphic shows a call reference guide for Sandata. It features the Sandata logo at the top, followed by the text "Group Visit Call Reference Guide: «COMPANY_NAME»". Below this is the "Agency Account Number: STX«ACCOUNT»" and a line for "Write your Santrax ID number above for easy reference.". A grey box contains the text "Dial: 1-«Primary_Phone»". At the bottom, there is a "Features:" section with two columns of options: "Call In/Out Prompting", "Group Visit - Yes", "Select Location", "Task", "Client Verification - Service", "Select Language", "Fixed Visit Verification -No", "Client Verification- Recording", and "Client Verification- Visit".

Providers receive several Call Reference Guides in their Sandata Welcome Kit. For Group Visits, employees should use the Call Reference Guide with the "Group Visit" label.

The Call Reference Guide walks employees through each step of the call.

TVV Group Visits Information Needed

Employees need the following resources to make a **check-in** TVV call:

- The provider specific toll-free phone number
- The clients' IDs
- The employee Santrax ID
- The client landline phone
- The Call Reference Guide with group visit instructions
- Worker Visit Card

18

Employees need the following resources to make a **check-in** TVV call:

The provider specific toll-free phone number

The clients' IDs

The employee Santrax ID

The client landline phone

The Call Reference Guide labeled for Group Visits

Worker Visit card

A great way to assure that employees have the required information for each TVV call is to provide them with **The Call Reference Guide with group visit instructions and a Worker Visit Card** for each client. The template can be found on the DHS EVV webpage/resources.

Employees should be prepared to write down the group visit code, as it will be needed for the check-out call.

TVV Group Visits Information Needed

Employees need the following resources to make a **check-out** TVV call:

- The Call Reference Guide with group visit instructions
 - The provider specific toll-free phone number
 - The clients' IDs
 - The employee's Santrax ID
 - The clients' landline phone
- (More on next slide)

19

As with other TVV calls, the employee will need the following

Employees need the following resources to make a **check-out** TVV call:

The Call Reference Guide with group visit instructions

The provider specific toll-free phone number

The clients' IDs

The employee's Santrax ID

The clients' landline phone

Worker Visit Card

TVV Group Visit Information Needed

- The group visit code
- The service ID of the services performed
- The task IDs for any tasks completed, if required by the provider
- The clients to verify the visit, if required by the provider

Note: Employees have three attempts to enter their Santrax ID correctly.

20

- The group visit code
- The service ID of the service performed. The full list is on the Worker Visit card for easy reference.
- The task IDs for any tasks completed, if required by the provider
- The clients to verify the visit, if required by the provider for record of care. Providers can decide if their employees will use EVV for tasks and client verification. For personal care services in fee for service, providers that capture tasks and client verification with EVV may use it as their record of care.

Please note, The employee will have three attempts to enter their Santrax ID correctly. So take your time and make careful entries on your phone pad. After the third attempt, the call will be ended. These visits will show on the EVV portal dashboard under “unknown employee”. The administrator can make corrections by going into Visit Maintenance.

Task ID List

| Task ID | Task Description | Task ID | Task Description |
|---------|------------------------------|---------|----------------------------------|
| 100 | Shower/Bathing | 105 | Dressing/Change |
| 110 | Prosthetics/splints/TEDS | 115 | Grooming |
| 120 | Assist w/Feeding | 125 | Mobility |
| 130 | Transferring | 135 | Toileting |
| 200 | Bowel Program (MOT) | 205 | Catheter Site Care (MOT) |
| 210 | Complex Positioning (MOT) | 215 | Feeding Tube Site Care (MOT) |
| 220 | Glucometer (MOT) | 225 | Medications: Assist/Remind (MOT) |
| 230 | Range of Motion (MOT) | 235 | Respiratory Assistance (MOT) |
| 240 | Skin Care (MOT) | 245 | Tube Feeding (MOT) |
| 250 | Vital Signs (MOT) | 255 | Wound Care (MOT) |
| 300 | Eyeglass/Hearing Aid(s) Care | 305 | Housekeeping |
| 310 | Laundry | 315 | Meal/Purchase Groceries |

MOT = Medically Oriented Task

21




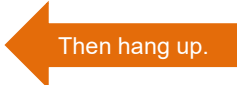

A reminder about tasks: Some employees will use EVV to enter the tasks, too. Please note—the number listed next to each task is entered if you use TVV.

Ask your provider if they require tasks to be included in EVV. For some providers, it provides the record of care. If your provider is not using EVV for the record of care, entering tasks like these is not required.

Please follow the instructions from your provider or fiscal employer agency.

How to End a Visit Without Tasks

Providers not requiring tasks or client confirmation to be reported during a visit should instruct their employees to hang up after confirming the service code:

15.  Enter the Service ID number of the service you performed.
Refer to your agency's service list.
 Santrax will say: "You entered (SERVICE). Please press one (1) to accept, two (2) to retry."
16.  Press the one (1) key to accept or press the two (2) key to retry.  Then hang up.
 Santrax will say: "Enter number of tasks."

If an employee isn't required to include tasks or client confirmation with EVV, they can hang up after confirming the service code
Please see the portion of the TVV call reference guide script. There's no need for these employees to continue the call.

Resources

Know that we are here to help, and provider agencies have many resources available.

Resources

EVV Customer Care:

- Phone: 833-931-2035, Monday–Friday, 7 a.m.–6 p.m.
- Email: VDXC.ContactEVV@wisconsin.gov

EVV webpage at www.dhs.wisconsin.gov/evv/index.htm

- Training resources
- Information about EVV in Wisconsin

Our EVV Customer Care team is here to help and can be reached by calling: 833-931-2035, Monday–Friday, from 7 a.m.–6 p.m.

Or by Email support at: VDXC.ContactEVV@wisconsin.gov

And our EVV webpage at www.dhs.wisconsin.gov/evv/index.htm

for information about:

Training resources

EVV in Wisconsin

Thank You

Thank you for the important services you provide to members.