



WISCONSIN DEPARTMENT  
*of* HEALTH SERVICES

# Electronic Visit Verification Program Payer Aggregator Training

# Agenda

- Electronic Visit Verification (EVV) Overview
- Wisconsin Department of Health Services (DHS) Timeline
- Aggregator Overview
- Access to Aggregator
- Visit Review
- Reports
- Resources

# EVV Overview

# EVV Overview

In response to the 21<sup>st</sup> Century Cures Act, EVV is required for:

- Medicaid-covered personal care services effective November 2, 2020\*.
- Medicaid-covered home health services effective January 1, 2023.

\*Wisconsin EVV soft launch implementation date

# EVV Overview (Cont.)

Service	Medicaid and BadgerCare Plus Fee-for-Service, BadgerCare Plus and Medicaid SSI HMOs	Family Care, Family Care Partnership	IRIS (Include, Respect, I Self-Direct)
Personal care services per 15 min. (T1019)	Yes	Yes	Yes
Personal care services per day (T1020)	n/a	Yes	n/a
Supportive home care per 15 min. (S5125)	n/a	Yes	Starts January 2021 after waiver renewal
Supportive home care per day (S5126)	n/a	Yes	Starts January 2021 after waiver renewal

# EVV Overview (Cont.)

## 6 KEY DATA POINTS



**Who receives service**



**Where service is provided**



**Who provides service**

**Date of service**



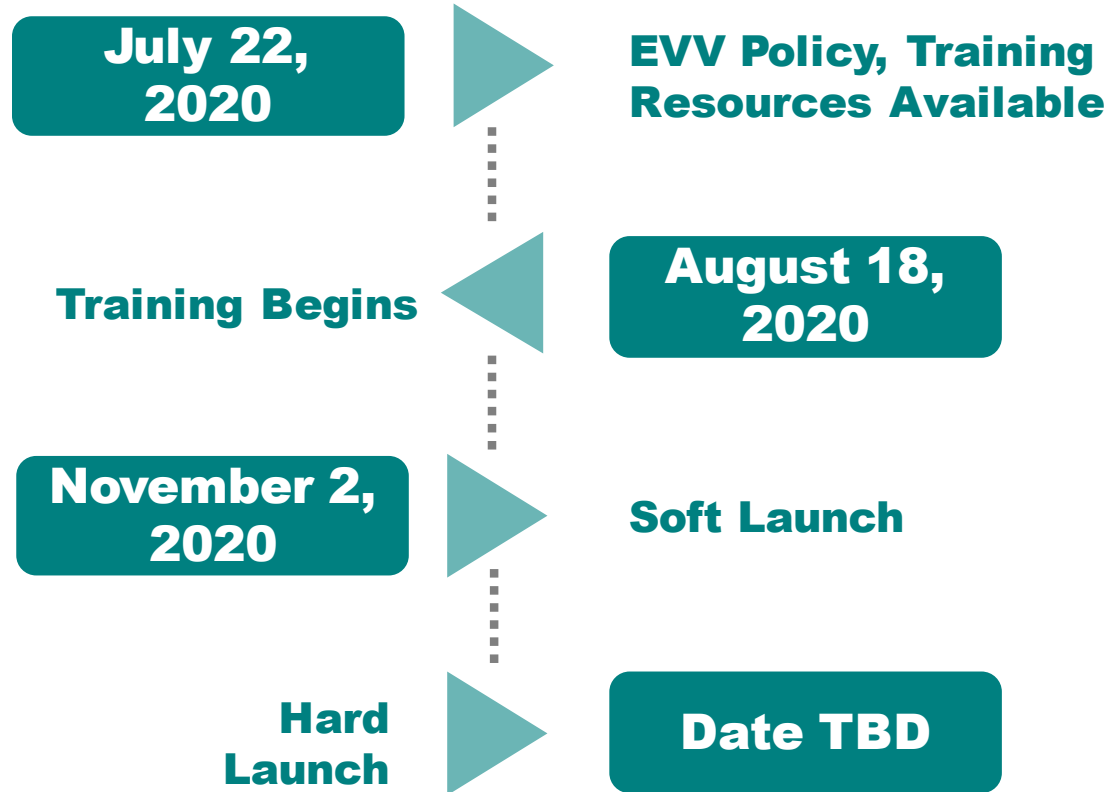
**What service is provided**

**Time in/  
Time out**



# DHS Timeline

# Current Timeline





# Soft Launch

- EVV is required for all personal care services and applicable supportive home care services paid for by Wisconsin Medicaid from November 2, 2020.
- Claims and encounters without EVV data will continue to be paid.
- The soft launch does not change current requirements for timesheets, records of care, or other documentation.

# Hard Launch

- This date remains under consideration.
- When determined, the date will be communicated to stakeholders through various channels.
- Claims or encounters without EVV data may be denied and personal care costs may be excluded from managed care capitation rate development.

# Aggregator Overview

# Aggregator Overview

- Provider agencies can choose to use either the DHS-provided EVV system or an alternate EVV data collection system.
- The Sandata Aggregator collects all EVV data for a read-only format.

# Aggregator Overview (Cont.)

- Data from a visit may be collected using:
  - Mobile visit verification (MVV).
  - Telephonic visit verification (TVV).
  - Fixed visit verification (FVV) device.
- Data can also be manually entered and edited by provider agency administrators.

# Aggregator Overview (Cont.)

Because the Sandata Aggregator is built to function across different states, the online Aggregator manual and videos from Sandata refer to some features that do not apply in Wisconsin including:

Schedules

Geofence references

Payroll

Employee performance/supervisor/pay

Billing

Employee Social Security numbers

Claims

# Aggregator Overview (Cont.)

- To access Sandata's aggregator videos to accompany this presentation, sign in to <https://www.sandatalearn.com>.
- Use the "login" option at the top right corner and enter in one of the following accounts.

Username	Password (case sensitive)
wiagggregator1	EVVSandata26
wiagggregator2	EVVSandata26

# Aggregator Overview (Cont.)

- Once signed in, click “My Courses.”
- Select “AGGREGATOR Self-Paced” by clicking “Start.” A list of all videos will appear. Play each as directed in the slide instructions.
- Because these shared logins are being used, individual videos may show as complete but can be played again.



# Aggregator Overview (Cont.)

## **Video One: Introduction to Aggregator (02:24)**

- The aggregator is used by alternate EVV users, program payers, and DHS.
- The video provides a read-only display of visit data pertinent to their network.

# Aggregator Overview (Cont.)

## **Video Two: Initial Login Process (02:45)**

- Initial users (security administrators) can be added November 2020.
- Subsequent users can be added by those security administrators.

# Aggregator Overview (Cont.)

- The temporary password email will be sent from [no-reply@sandata.com](mailto:no-reply@sandata.com) with subject line “Sandata.evv Temporary Password.”
- Passwords expire after 60 days.
- URL: <https://evv.sandata.com>
- The username is the email address.
- The password needs to be at least 12 characters.
- “Remember me” saves the username only.

# Aggregator Overview (Cont.)

## **Video Three: Navigation (01:51)**

- Users with multiple accounts only need to log in to the system once, then they can switch between associated accounts at the top.

# Aggregator Overview (Cont.)

- Americans With Disabilities Act (ADA)-accessible features include Job Access With Speech (JAWS)-reader compliance and navigation using the Tab key.
- The system automatically logs out displaying a warning message after 15 minutes of idle time.

# Access to Aggregator

# Access to Aggregator

## **Video Four: Resetting a Password (00:35)**

- User accounts are locked after three unsuccessful login attempts and must be unlocked by an administrator.
- A user can reset their own password to an unlocked account using the “Forgot Password?” prompt.

# Access to Aggregator (Cont.)

## **Video Five: Create User (02:44)**

- Search the current user list first to avoid duplicates.
- Find a list of all users by searching without criteria.
- Employ the locked box to temporarily restrict user access or restore access.



# Access to Aggregator (Cont.)

Video Six: Modify User (00:53)

Video Seven: Delete User (00:51)

# Access to Aggregator (Cont.)

## **Video Eight: Create User Role (01:57)**

- Roles determine what a user can do within the Aggregator.
- A security administrator has administrative capabilities and can:
  - Access security module.
  - Create/edit all Sandata Aggregator users for the payer.
  - Access visit review and playback signatures.
  - Access analytics—reporting.

# Access to Aggregator (Cont.)

- An auditor is expected to:
  - Look for specific information for an agency, member, or direct care worker.
  - Access Visit Review and playback signatures.
- Jurisdictional Oversight is intended for the global users including program oversight and will:
  - Access visit review and playback signatures.
  - Access analytics—reporting.

# Access to Aggregator (Cont.)

Video Nine: Modify User Role (00:57)

Video 10: Delete User Role (00:37)

# Access to Aggregator (Cont.)

Access groups control what data the user can see:

- Define which accounts, payers, programs, and services can be viewed by a user or user role
- Can be set up, modified, and deactivated

# Visit Review

# Visit Review

## **Video 11: Visit Details (02:16)**

- “In real time” depends on the transmission of data at the point of care and from alternate EVV vendors.
- “Call” can refer to mobile app, telephony, fixed visit device, or manually entered visits.
- “History” refers to manual changes made to the visit, and who made the change. Complete information about edits is available through various reports.

# Visit Review (Cont.)

## **Video 12: Visit Filters and Sorting (05:16)**

- The “read-only” data is available from the start of EVV onwards, for a maximum date range of up to one year.
- “Omit” and “processed” visit statuses are not used in Wisconsin.
- When a search is complete, users can view details of a single visit by clicking the “View” icon on the far-right of each line.



# Visit Review (Cont.)

The screenshot shows the Sandata Mediator Visit Review interface. On the left is a navigation sidebar with the Sandata Mediator logo and menu items: 'Navigate Modules', 'Visit Review' (highlighted with a red circle 1), 'Reports', 'Security', and 'Online Manual'. The main content area is titled 'Visit Review' and includes a 'LOG OUT' link in the top right. A red box labeled 2 encloses the search filters: #CDNF, CLIENT, MEDICATED ID#, EMPLOYEE, and EMPLOYEE SSN (with input fields); DOB RANGE MM/DD/YYYY (with date pickers for 03/01/2019 and 05/15/2019); and SORT ORDER and VISIT STATUS (with dropdown menus for 'All' and 'All Exceptions'). Below the filters is a search bar labeled 3 containing 'Q SEARCH' and 'CLEAR' buttons, and an 'EXPORT' button. To the right of the search bar are links for 'Show Advanced Filter Options' and 'Show Display Options'. Below the search bar is a pagination control showing '1' of 1 entries. A table displays visit data with columns: Client Name, Employee Name, Service, Visit Date, Scheduled Time In, Scheduled Time Out, Scheduled No, Call In, Call Out, Call Hours, Adjusted Hours, Bill Hours, Visit Status, De Hist, and Actions. One entry is visible for 03/07/2019 with a call out of 05:30 PM and a status of 'Incomplete' (highlighted with a red circle 4). A second pagination control at the bottom shows '1' of 1 entries.

# Visit Review (Cont.)

<b>GENERAL</b>	SCHEDULED START TIME	SCHEDULED END TIME		
<b>CLIENT</b>	None	None		
<b>EMPLOYEE</b>	VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
<b>CALL LOG</b>	03/07/2019	None	US/Eastern	Incomplete
<b>EXCEPTIONS</b>	CALL IN	CALL OUT	CALL HOURS	UNITS
<b>GPS</b>	05:30 PM	None	None	None
<b>MEMO</b>	ADJUSTED IN	ADJUSTED OUT	BILL HOURS	
<b>CLAIMS</b>	None	None	None	
<b>HISTORY</b>	AGENCY ID	AGENCY NAME		
	<input type="text"/>	<input type="text"/>		
	RIVER	PROGRAM	SERVICE	GROUP VISIT CODE
	<input type="text"/>	None	None	None
	CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	
	No	No	No	
	VISIT SOURCE	SCHEDULE ID	EXTERNAL ID	<input type="checkbox"/> DO NOT BILL
	SANDATA	None	<input type="text"/>	
<b>CLOSE</b>				

# Reports

# Reports

## Video 13: Running Reports (01:51)

- The Aggregator Manual has printed examples of the many types of reports available. We will highlight a few later.
- Reports are divided into several groups:

Alerts

Date range

Authorizations

FVV

Billing (n/a for Wisconsin)

Security

Daily

# Reports

Video 14: Analyzing Report Data (02:23)

Video 15: Sample Daily Reports (01:29)

# Reports (Cont.)

## **Video 16: Sample Date Range Reports (01:27)**

The Aggregator Manual, available within the platform, has detailed information about each report:

Description	Report grouping tab
Use	Report output
Parameters	Screenshot sample

# Highlighted Reports for Program Payers

# Call Listing Report

- Displays all call activity (MVV, TVV, FVV, manual) for the day and time range specified.
- Lists calls sequentially, beginning with those missing data.
- Groups calls by account, payer, and program.



# Provider Listing Report

- Displays account information for all provider agencies associated within the group.
- Provides provider agency Sandata account number, Medicaid ID, and date created.

# Detail Visit Status Report

- Displays a detailed view of all visits.
- Identifies visits that need correction.
- Groups by account, payer, program, and visit status.

# Visit Log Report

- Displays all visits grouped by client.
- Summarizes client's visits.
- Groups by account, payer, client name, client phone number, and client Medicaid ID.

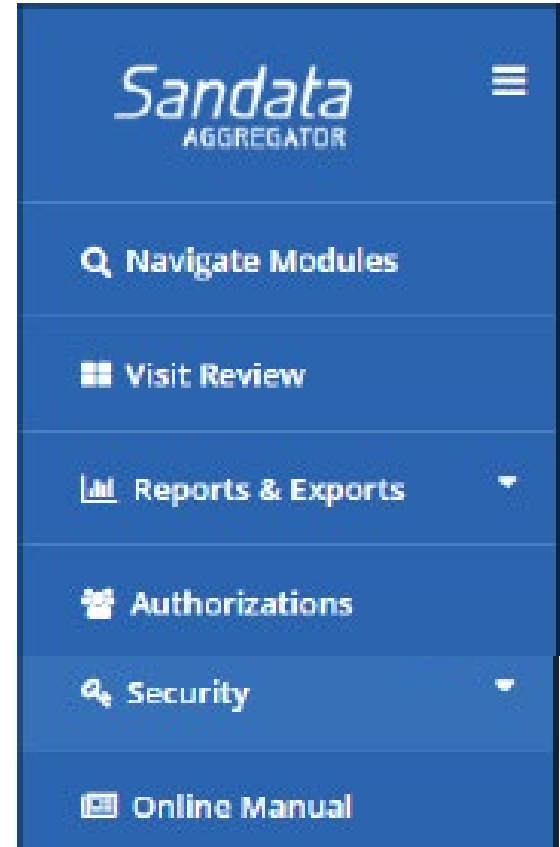
# Visit Verification Activity Summary Report

- Displays a list of modifications for each visit.
- Sorts by the user who modified the visit.
- Includes what change was made, who made the change, when and why the change was made, and the reason code used.
- Groups by account, payer, and program.

# Resources

# Resources

- The Sandata Aggregator Manual is updated regularly.
- It can be used as an online manual or printed for use.



# Resources (Cont.)

Program payer EVV information can be found on the DHS EVV web page.

<https://www.dhs.wisconsin.gov/evv/programadmin.htm>

## Electronic Visit Verification (EVV): Information for Program Payers



### Wisconsin's EVV solution

The Wisconsin Department of Health Services (DHS) selected an EVV system for use within all DHS programs and impacted provider agencies, HMOs, MCOs, Family Care fiscal employer agents (FEAs), and IRIS FEAs. This eliminates the need for individual organizations to purchase an EVV solution. Organizations interested in using an alternate EVV system may use it as long as it meets DHS business and technical requirements.

### Billing information

EVV visit data will need to be collected for care provided under the following service codes:

# Resources (Cont.)

ForwardHealth Update 2020-31 contains additional information about EVV policy.

<https://www.forwardhealth.wi.gov/kw/pdf/2020-31.pdf>





# Q&A

**Thank you**