



WISCONSIN DEPARTMENT
of HEALTH SERVICES

Sandata Electronic Visit Verification Portal: Modify Client Data

Agenda

- Client Information Exchange
- Reasons for Modifying Client Data
- Modifying Client Data
- Adding New Address
- Adding Phone Number
- Change Client Status
- Resources



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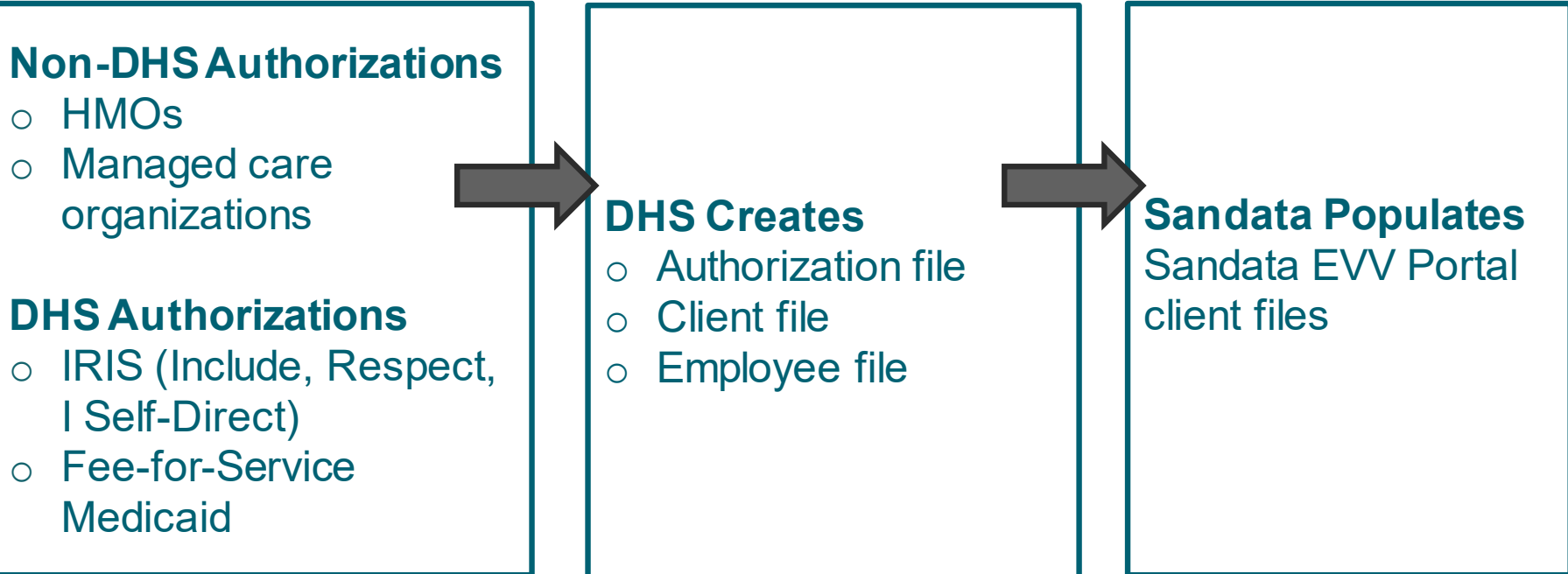
Client Information Exchange

Client Information Exchange

- The Wisconsin Department of Health Services (DHS) sends client information to Sandata based on the client's:
 - Approved authorizations for EVV services.
 - Medicaid client enrollment file.
- Both authorization and client files are sent to Sandata nightly.

Client Information Exchange (2)

- Client information only moves in one direction, from DHS to Sandata.





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Reasons for Modifying Client Data

Reasons for Modifying Client Data

- As before, the member/participant is required to make sure their address is current through ACCESS, their Consortia, their Family Care MCO, or IRIS ICA. This has not changed with EVV.
- It is important that the member/participant also keep their address current with all other applicable entities including the Social Security Administration and the foster care system.

Reasons for Modifying Client Data

If the member/participant has not updated their address, the provider agency can add a valid and verifiable address or phone number to the Sandata EVV Portal client profile.

- This will only update Sandata.
- It will not update ACCESS, SSA, or any other system.

Reasons for Modifying Client Data

Providers may need to modify certain client data by:

- Adding an additional client valid and verifiable address for mailing the fixed visit verification device or ensuring GPS accuracy.
- Adding an additional valid and verifiable landline phone number to prevent an “unknown client” exception.
- Changing the client’s status from pending to active:
 - Easily identify new or updated client authorizations.
 - Change Start of Care (SOC) date to match first EVV visit.



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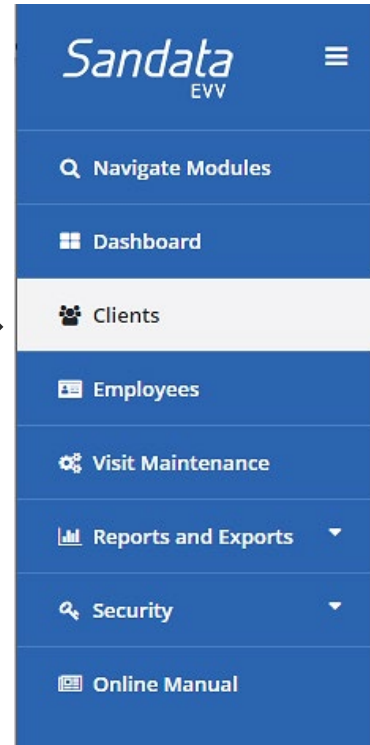
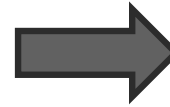
Modifying Client Data

Modifying Client Data

- Clients are responsible for maintaining accurate phone and address information with Wisconsin Medicaid.
- These optional client data can be modified in the Sandata EVV Portal:
 - Additional valid and verifiable addresses
 - Additional valid and verifiable landline phone numbers
 - Any client email addresses
 - Client status

Modifying Client Data (2)

- Log in to the Sandata EVV Portal.
- From the navigation panel, click **Clients** to access client records. The Client/Program search screen will be displayed.



Modifying Client Data (3)

- Search for client.

LAST NAME

FIRST NAME

STATUS

CLIENT ID

CLIENT PAYER ID

MEDICAID ID

PROGRAM

LANGUAGE

PRIMARY PAYER

Show: per page

Showing 1-3 of 3 entries















Name	Program	Status	Supervisor	Medicaid ID	Client Payer ID	As Of	SOC	EOC	Services
+ client one, test	Fee For Service	● Pending		9876543210		1/26/21			T1019
+ client two, test	Fee For Service	● Pending		0123456789		1/26/21			T1019
+ client, test one	Fee For Service	● Pending		9987654321		1/26/21			T1019

Showing 1-3 of 3 entries

Modifying Client Data (4)

- Click Edit  next to the desired client name.

Showing 1-3 of 3 entries

		1								
<u>Name</u>		<u>Program</u>	<u>Status</u>	<u>Supervisor</u>	<u>Medicaid ID</u>	<u>Client Payer ID</u>	<u>As Of</u>	<u>SOC</u>	<u>EOC</u>	<u>Services</u>
  client one, test		Fee For Service	 Pending		9876543210		1/26/21			T1019
  client two, test		Fee For Service	 Pending		0123456789		1/26/21			T1019
  client, test one		Fee For Service	 Pending		9987654321		1/26/21			T1019



Adding New Address

Adding New Address

- Select the **Add New Address** button to add a valid and verifiable address.

Personal Program Diagnosis

Personal

TITLE: Select Title ▾ FIRST NAME *: test MIDDLE INITIAL:

LAST NAME *: client one SUFFIX: Select Suffix ▾ SSN: XXX-XX-XXXX

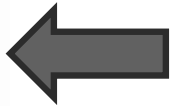
GENDER *: 0- Unknown ▾ BIRTH DATE: mm/dd/yyyy 📅 PRIMARY SPOKEN LANGUAGE: ENG- English ▾

Addresses (1)

123 right here street H- Home (Current) ▾ **ADD NEW ADDRESS** ←

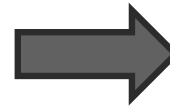
ADDRESS TYPE *: H- Home ▾ ADDRESS LABEL:

ADDRESS LINE 1 *: 123 right here street ADDRESS LINE 2:



Adding New Address (2)

- Select Address Type **O- Other** from the drop-down menu.
- Enter an **Address Label** to help identify the new address type.
- Enter **Address Line 1**, **Zip code**, **City**, **State**, and any additional **Phone** number(s).



Addresses (2)

ADDRESS TYPE *
Select Address Type
B- Business
H- Home
O- Other

ADDRESS LABEL

ADDRESS LINE 2

ZIPCODE *

CITY *

COUNTY

STATE *
Select State

Phone Numbers, Etc

PHONE 1

PHONE 2

PHONE 3

PHONE 4

EMAIL

ACTIVE

Adding New Address (3)

- Click **Save & Close**.





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Adding Phone Number

Adding Phone Number

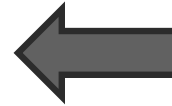
To add an additional phone number:

- Click **Add New Address**.

Addresses (2)

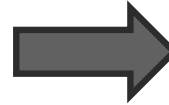
Home:2 E Main St H- Home (Current/Billing)
Select Address Type

ADD NEW ADDRESS



Adding Phone Number (2)

- Select Address Type **O- Other** from the drop-down menu.
- Enter **Address Label**.
- Manually re-type the current address in order to be able to save changes.



Addresses (2)

1/26 updated phone number:987 somewi

ADDRESS TYPE * ADDRESS LABEL

ADDRESS LINE 1 * ADDRESS LINE 2 ZIPCODE *

CITY * COUNTY

STATE *

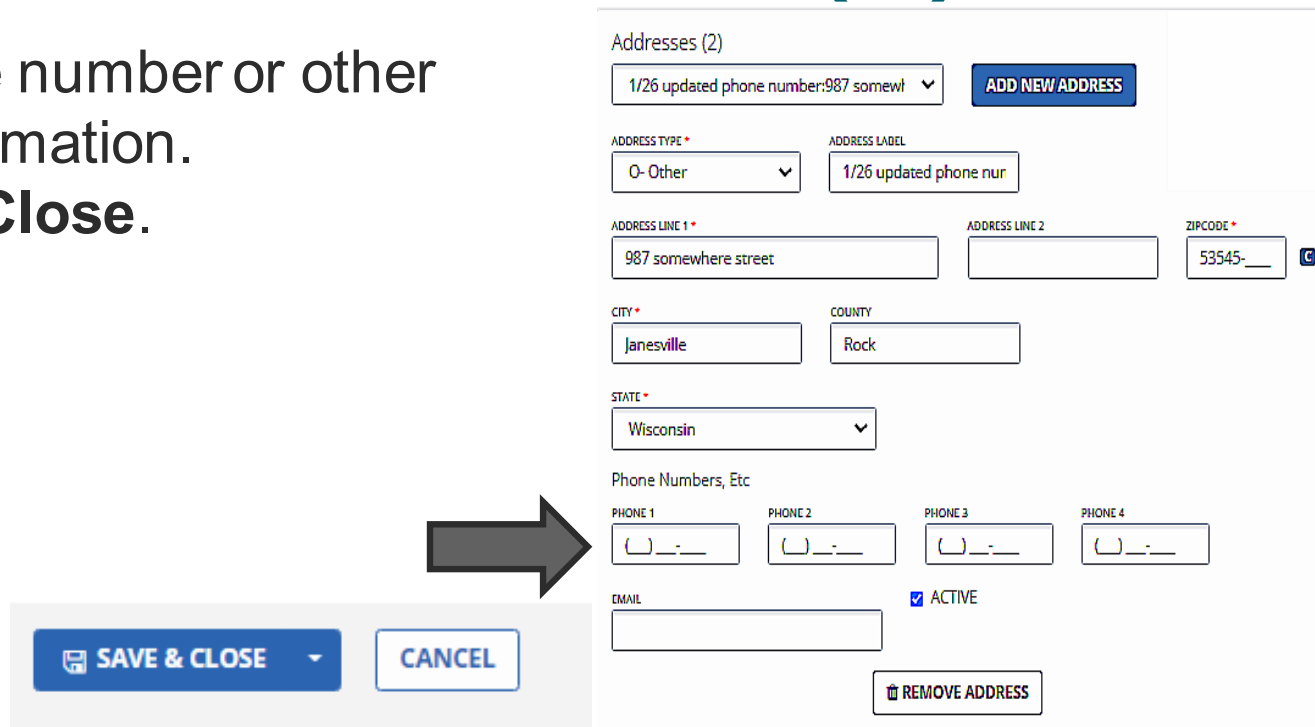
Phone Numbers, Etc

PHONE 1 PHONE 2 PHONE 3 PHONE 4

EMAIL ACTIVE

Adding Phone Number (3)

- Add the phone number or other additional information.
- Click **Save & Close**.



Addresses (2)

1/26 updated phone number:987 somewl

ADDRESS TYPE * ADDRESS LABEL

O- Other 1/26 updated phone nur

ADDRESS LINE 1 * ADDRESS LINE 2 ZIPCODE *

987 somewhere street 53545-__

CITY * COUNTY

Janesville Rock

STATE *

Wisconsin

Phone Numbers, Etc

PHONE 1 PHONE 2 PHONE 3 PHONE 4


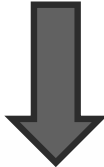
EMAIL ACTIVE





Change Client Status

Change Client Status

- Search for client.
- Click **Edit**  next to the desired client name.



Showing 1-2 of 2 entries

<u>Name</u>	<u>Program</u>	<u>Status</u>	<u>Supervisor</u>	<u>Medicaid ID</u>	<u>Client Payer ID</u>	<u>As Of</u>	<u>SOC</u>	<u>EOC</u>	<u>Services</u>
 + Test, Member	Fee For Service	● Pending		1234567890		1/20/21			T1019
 + Test, Member two	Fee For Service	● Pending		0987654321		1/20/21			T1019

Change client Status (2)

Sandata EVV Portal dates will default to the date the file was created.

Program Tab

- The **Effective Date** is the date client status changes were made.
- The **Created Date** is the date the client record was created.
- The **Start of Care (SOC) Date** is the date services began.

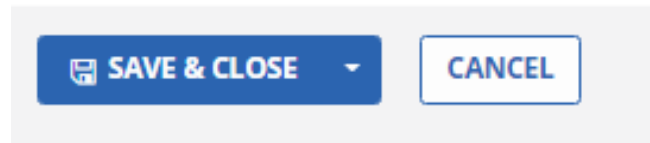
Change Client Status (3)

- Navigate to the **Program** tab.
- Default status is **01- Pending**.
- The **Effective Date** field defaults to the date the client record was created.

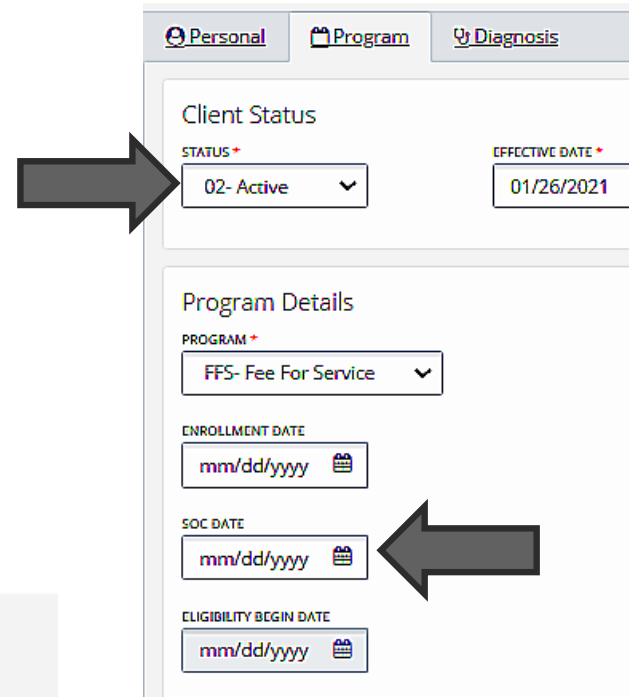
The screenshot displays a software interface with three tabs: Personal, Program, and Diagnosis. The 'Program' tab is active. Below the tabs, the 'Client Status' section contains three fields: 'STATUS *', 'EFFECTIVE DATE *', and 'REASON FOR CHANGE'. The 'STATUS *' dropdown menu is open, showing options: '01- Pending' (selected), '02- Active', and '04- Inactive'. The 'EFFECTIVE DATE *' field shows '01/26/2021' with a calendar icon. A large black arrow points from the 'EFFECTIVE DATE *' field back to the 'STATUS *' dropdown. The 'REASON FOR CHANGE' dropdown is set to 'Select Reason For Char'. Below these fields, the 'Program Details' section is partially visible, showing 'PROGRAM #' and 'BUSINESS #'.

Change Client Status (4)

- Set the client's status to **02- Active**.
- Change Start of Care date, if needed.
- Click **Save & Close**.



SAVE & CLOSE CANCEL



Personal Program Diagnosis

Client Status

STATUS * 02- Active EFFECTIVE DATE * 01/26/2021

Program Details

PROGRAM * FFS- Fee For Service

ENROLLMENT DATE mm/dd/yyyy

SOC DATE mm/dd/yyyy

ELIGIBILITY BEGIN DATE mm/dd/yyyy

Change Client Status (5)

- Clients cannot be deleted from the Sandata Portal, only inactivated.
- Using **04- Inactive** is optional.
- Changing client status does not replace current end dating authorization processes.
- Enter the client's end date in the End of Care (**EOC Date**) field.

Client Status

STATUS *	EFFECTIVE DATE *	REASON FOR CHANGE *
04- Inactive ▾	10/20/2020 📅	Select Reason ▾

Program Details

PROGRAM *	SUPERVISOR
FFS- Fee For Service ▾	Select Supervisor ▾
ENROLLMENT DATE	CREATED DATE *
mm/dd/yyyy 📅	10/19/2020 📅
SOC DATE	EOC DATE *
12/01/2019 📅	mm/dd/yyyy 📅
ELIGIBILITY BEGIN DATE	ELIGIBILITY END DATE
mm/dd/yyyy 📅	mm/dd/yyyy 📅



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Resources

Resources

- EVV Customer Care at 833-931-2035, Monday–Friday, 7 a.m.–6 p.m.
- Email support at VDXC.ContactEVV@wisconsin.gov
- EVV webpage at <https://www.dhs.wisconsin.gov/evv/training-administrators.htm> for additional client module information:
 - PowerPoint 4: Client Format, P-02749
 - Wisconsin EVV Supplemental Guide, P-02745
 - Modify Client Data Demonstration Videos



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Thank You