



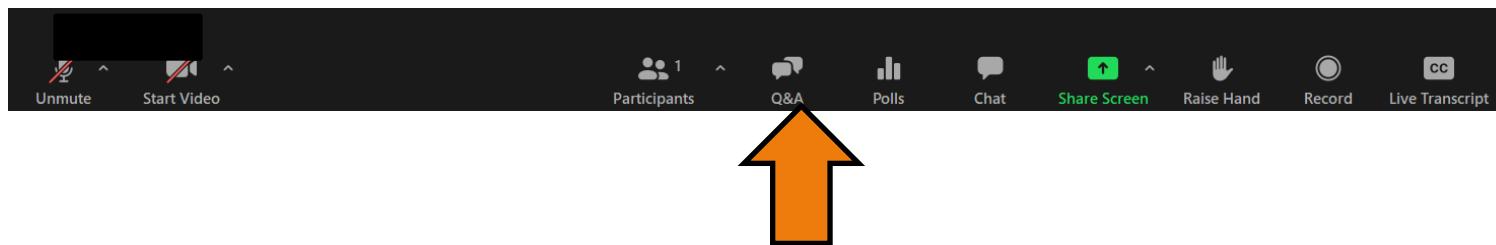
Electronic Visit Verification and Independent Nurses

Agenda

- Electronic Visit Verification (EVV) Basics
- Getting Ready in the ForwardHealth Portal
- Adding Authorization Information
- Checking In and Out
- Using Visit Maintenance
- Common EVV Questions
- Next Steps
- Q&A

Conversation Guidelines

- Focus on questions for today's EVV presentation.
- Please maintain privacy.



EVV Basics



EVV Basics

6 KEY DATA POINTS



Who receives service



Who provides service



What service is provided

Where service is provided



Date of service



**Time in/
Time out**



Home Health Service Codes Requiring EVV

Personal Care Services (T1019) Nurse Supervisory Visit Code	Private Duty Nursing (PDN) Codes (Independent Nurses and Agency Nurses)	Non-PDN Nursing Codes (Independent Nurses and Agency Nurses May Use)	Therapy Codes
99509 (Home visit for assistance with activities of daily living and personal care)	99504 (Home visit for mechanical ventilation care)	99600 (Unlisted home visit service or procedure)	92507 (Treatment of speech, language, voice, communication, and/or auditory processing disorder)
	S9123 (Non-vent private duty nursing care in home—by RN)	T1001 (Nursing assessment/evaluation)	97139 (Unlisted therapeutic procedure—occupational therapy)
	S9124 (Non-vent private duty nursing care in home—by LPN)	T1502 (Administration of oral, intramuscular, and/or subcutaneous medication)	97799 (Unlisted physical medicine/rehab service or procedure—physical therapy)
		T1021 (Home health aide or CNA visit)	



EVV Basics

Are independent nurses
“providers”? **Yes.**

Find information for
providers and independent
nurses on the Wisconsin
Department of Health
Services (DHS) EVV
Providers webpage:
www.dhs.wi.gov/evv/providers.htm

 WISCONSIN DEPARTMENT
of HEALTH SERVICES

[About DHS](#) [Data & Statistics](#) [Diseases & Conditions](#) [Health Care & Coverage](#) [Long-Term Care & Support](#) [Prevention & Healthy Living](#) [For Partners & Providers](#) [Certification, Licenses & Permits](#)

[Home](#) > [For Partners & Providers](#) > [Electronic Visit Verification](#) > Electronic Visit Verification (EVV): Providers and Independent Nurses

[EVV: Home](#)
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[Payers](#)
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Electronic Visit Verification (EVV): Providers and Independent Nurses

EVV verifies [Medicaid-funded service codes requiring use of an EVV system](#) that were provided by collecting the following 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

Wisconsin's EVV solution

The Wisconsin Department of Health Services (DHS) selected the Sandata EVV system that can be used by all DHS programs and impacted provider agencies, HMOs, MCOs, Family Care fiscal employer agents (FEAs), and IRIS FEAs. Individual organizations do not need to purchase an EVV solution. Organizations may choose to use a different, or alternate EVV system. Learn more about specific DHS business and technical requirements on the [Alternate EVV webpage](#).

Technology to collect EVV data

When using the DHS-provided Sandata EVV system, workers may use a smart phone or tablet to enter the date, time, location, and service. In some cases, they may use a small digital device or a member's landline telephone. Alternate EVV

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.contactevv@wisconsin.gov



Two Roles of Independent Nurses

Administrator

ForwardHealth Portal and
Sandata EVV Portal



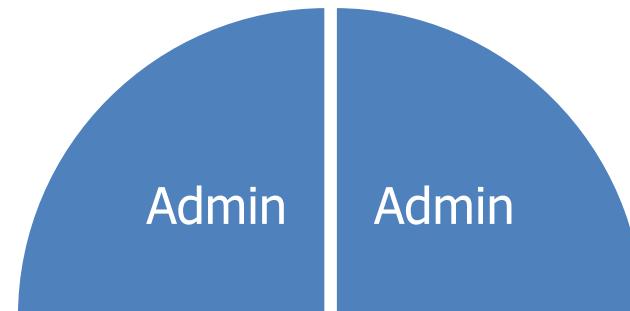
Worker

Sandata Mobile Connect (SMC) app
(or other method)



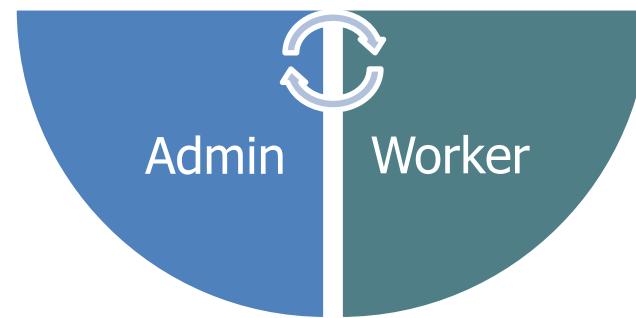
Two Roles of Independent Nurses

Getting ready
in the
ForwardHealth
Portal



Adding client
authorization
information in the
Sadata EVV
Portal

Using visit
maintenance
in the
Sadata EVV
Portal



Checking in and
out of a visit



Two Roles of Independent Nurses

www.dhs.wi.gov/evv/training-independent-nurses.htm

- Outline of roles
- FAQs
- Links to tutorials and refreshers
- Easy access to EVV Customer Care assistance

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Have questions? Need help?
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- Telephonic visit verification (TVV) uses the client's landline phone
- Fixed visit verification (FVV) uses a small device ordered from Sandata, followed by a phone call.

You can choose whichever method works best. You can check in with one method and check out of the visit using another, if needed. Access trainings about each of these three methods on the [Worker training webpage](#).

Independent nurses using an alternate EVV system should complete the training steps on the [Alternate EVV webpage](#).

Independent nurse FAQs

View additional frequently asked questions and their answers, including those about EVV and claims, on the [EVV FAQ webpage](#).

Close all	Open all
How do I get a Sandata EVV portal link, username, and password?	+
How do I start using EVV for visits to clients?	+
Where do I find DHS EVV policy?	+
How do I request training materials in other languages?	+
How can independent nurses tell whether a claim was denied because of EVV?	+
Where can providers find more information about EVV and fee-for-service claims?	+

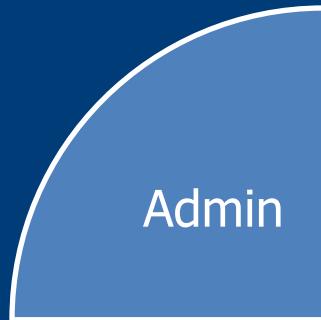
Tutorials and refreshers

Resource Title and Languages	Description
EVV and Independent Nurses, P-03626, in English (PDF)	DHS PowerPoint presentation: An introduction to what EVV looks like for independent nurses using the DHS-provided Sandata system; Your role as a worker, including efficient use of Sandata's app; and your role as an administrator, including adding client authorization information, correcting exceptions, understanding EVV and claims, and using best practices.
EVV and Independent Nurses (O)	DHS video: EVV basics (0:45), getting ready in the ForwardHealth Portal (7:15), adding authorization information (4:37), checking in and out as a worker (30:18), using visit maintenance (36:42), common EVV questions (44:50), next steps (51:23), (53:49 total minutes)

Use the resources below to guide you, step-by-step, through specific EVV tasks. Use a combination of resources that makes the most sense for your needs: video, PowerPoint, or written materials.

On this page

[Independent nurse FAQs](#)
[Tutorials and refreshers](#)
[How can I get help?](#)



Getting Ready in the ForwardHealth Portal

Medicaid-Enrolled Providers

- The provider's business name, email listed in the ForwardHealth Portal, and the provider Medicaid ID is sent to Sandata.
- The Medicaid ID is:
 - Displayed on Remittance Advice (RA).
 - Eight to nine digits long.





ForwardHealth Portal Account

Home Page

- Update User Account
- Update Adult LTC Waiver Service(s) or
- Programs(s)
- Demographic Maintenance
- Check My Revalidation Date
- Revalidate Your Provider Enrollment
- Check Enrollment
- Provider Enrollment Upload File Check
- ForwardHealth E-payment



Electronic Visit Verification Links

- Add Worker
- Upload Worker File
- Manage Workers
- List of Workers within your agency
- EVV Portal Functionality User Guide

Wisconsin EVV Customer Care - 833-931-2035.



EVV Demographic Maintenance

Make sure
your business
information is
up to date.

[Introduction](#) » [Practice Location Address](#) » [Mailing Address](#) » [Financial Information](#)
[Additional Information](#) » [Medicare Information](#) » [Managing Employee](#) » [Tax Exempt and Public/Private Status](#)
[Medicaid Service Provider and Medicaid Member Count](#) » [County and Tribe Served for LTC Waiver Services](#) » [Upload Files and Submit](#)

Practice Location Address ?

Required fields are indicated with an asterisk (*).

• Practice Location is the street address where the provider's office is physically located even if services are delivered in a home or community setting.
• A provider directory search is available to the public. The address and telephone number for member use will be included in the provider directory.
• The contact person and telephone number for the contact person will be used for Medicaid administrative purposes only.
• County is required if the practice location is in Wisconsin.

Street Address Line 1* 123 FORWARDHEALTH DR.

Street Address Line 2

City* MADISON

State/ZIP* WI 53702 - 0021

County Dane

Contact Person* MICHAEL JONES

Telephone Number - Contact Person* (608)262-1763 Ext.

Telephone Number - Member Use*

 Previous Next Exit



Add Worker

Add yourself as a worker.



Electronic Visit Verification Links

- Add Worker
- Upload Worker File
- Manage Workers
- List of Workers within your agency
- EVV Portal Functionality User Guide

Wisconsin EVV Customer Care - 833-931-2035.

Add Worker

Required fields are indicated with an asterisk (*).

** DHS does not require live-in worker to capture EVV; however, some HMOs, MCOs, or provider agencies may require live-in workers to capture EVV. Only check the box "Exempt from EVV Requirements" if the worker is not required to capture EVV for any of the people they provide services to for your agency.

Worker Search Criteria

First Name
Last Name
Social Security Number
Date Of Birth (i.e. 07/04/1980)

Worker Search Results

*** No rows found ***

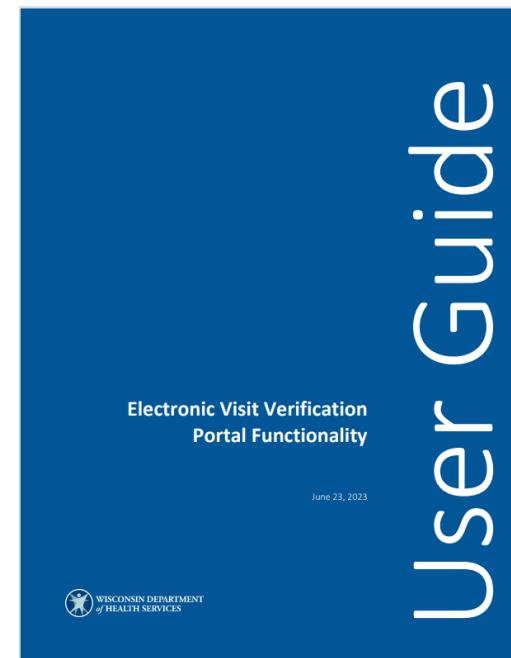
Add/Associate Worker

First Name*
Middle Initial
Last Name*
Social Security Number*
Date Of Birth (i.e. 07/04/1980)*
Gender Male Female
Worker Email
Confirm Worker Email
Worker Start Date (i.e. 01/03/2020)
Exempt from EVV Requirements**



EVV Portal Functionality User Guide

- Chapter 6: EVV Demographic Maintenance Tool
- Chapter 7: Worker Association (Add Worker)



www.dhs.wi.gov/publications/p02713.pdf



Apply Your Knowledge

True or False?

- Independent nurses can use the same trainings and resources as other providers.
- Since they don't have any employees, independent nurses don't need to enter workers in the ForwardHealth Portal.



True

False



Call to Action



Confirm your business email address in the ForwardHealth Portal.

Locate your Medicaid ID (not your National Provider Identifier [NPI]).

Add your “worker self” to your business in the ForwardHealth Portal.



Curious for more?

Here's where you can find it.

Resource Title and Languages

[ForwardHealth Portal](#)
[Electronic Visit Verification Portal](#)
[Functionality User Guide, P-02713 \(PDF\), in English](#)

[How to Create and Maintain EVV Worker IDs](#) 



EVV: Home

What's New

Members

IRIS

Providers and Independent Nurses

Payers

Alternate EVV

Training

Resources and FAQs

Contact Us

Electronic Visit Verification (EVV): Administrator Training

Administrator training

The resources on this page help administrative staff, including independent nurses, learn to use the Sandata EVV portal. You can also use these resources to guide you, step-by-step, in EVV processes. Use a combination of resources that makes the most sense for your needs: video, presentation, or written materials.

Administrator FAQs

View additional frequently asked questions and their answers, including those about EVV and claims, on the [EVV FAQ webpage](#).

[How do I get a Sandata EVV portal link, username, and password?](#) 

[How do other administrators get trained?](#) 

[How do I train workers to use EVV?](#) 

[How do I request training materials in other languages?](#) 

[Where do I find out about DHS EVV policy?](#) 

Administrator tutorials and refreshers

[Information for new EVV administrators](#) 

[Getting started: ForwardHealth Portal](#) 

[Getting started: Sandata EVV portal](#) 

[Client data entry: Adding and editing clients](#) 

[Employee data entry: Adding and editing workers](#) 

[Visit methods: Sandata Mobile Connect, Telephonic Visit Verification, Fixed Visit Verification](#) 

[Visit maintenance and clearing exceptions in Sandata](#) 

www.dhs.wi.gov/evv/training-administrators.htm

On this page

[Administrator training](#)

[Administrator FAQs](#)

[Administrator tutorials and refreshers](#)

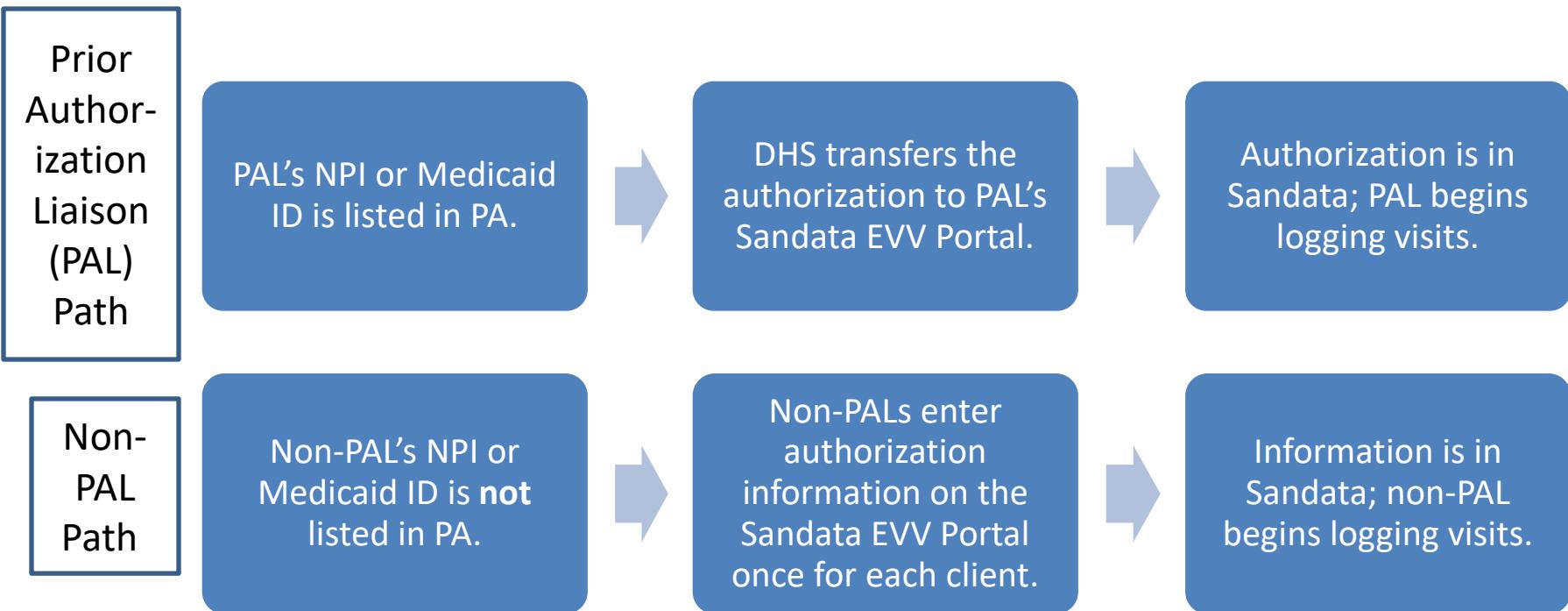
[How can I get help?](#)



Adding Authorization Information

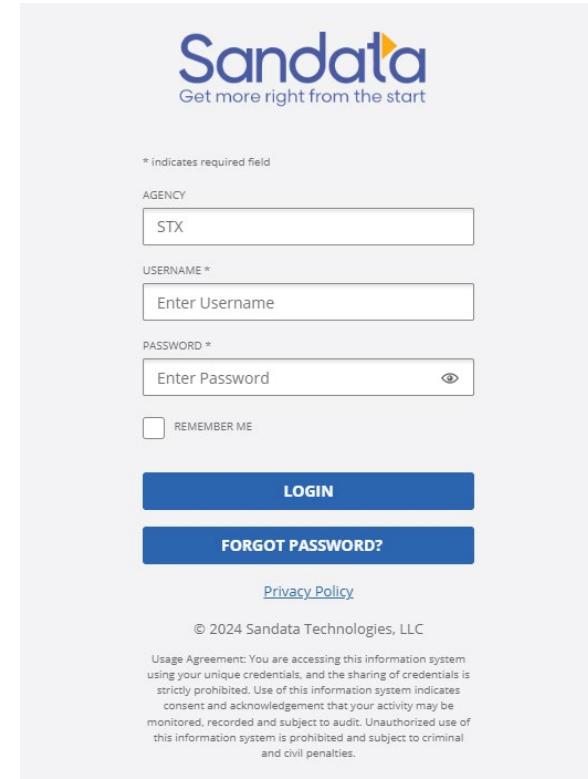


PALs and EVV Authorization Information

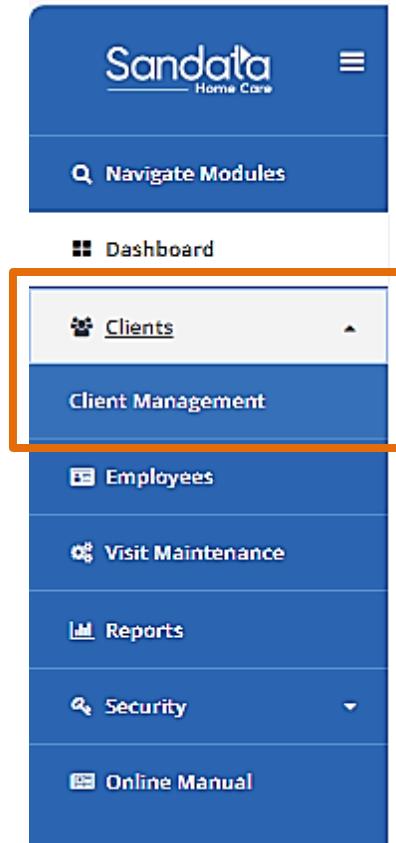


Search for Existing Client File

- Log in to the Sandata EVV Portal.
- From the navigation panel, click **Clients** then **Client Management** to access client records.

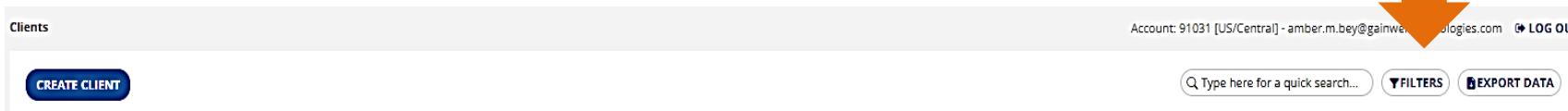


The image shows the Sandata Home Care login page. The logo 'Sandata' with the tagline 'Get more right from the start' is at the top. Below it are fields for 'AGENCY' (STX), 'USERNAME' (Enter Username), and 'PASSWORD' (Enter Password). There is a 'REMEMBER ME' checkbox, a 'LOGIN' button, and a 'FORGOT PASSWORD?' link. At the bottom, there is a copyright notice for 2024 Sandata Technologies, LLC, and a usage agreement disclaimer.





Search for Existing Client File



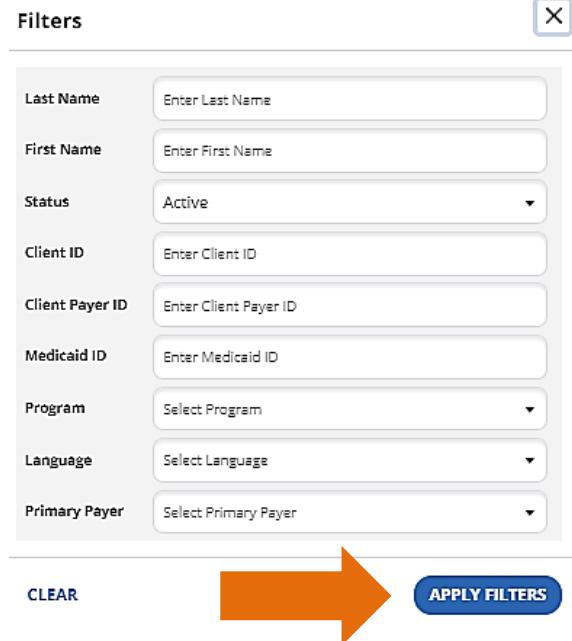
Clients

Account: 91031 [US/Central] - amber.m.bey@gainways-technologies.com 

CREATE CLIENT

Type here for a quick search...  

- Click **Filters**.
- Enter search criteria.
- Click **Apply Filters**.



Filters 

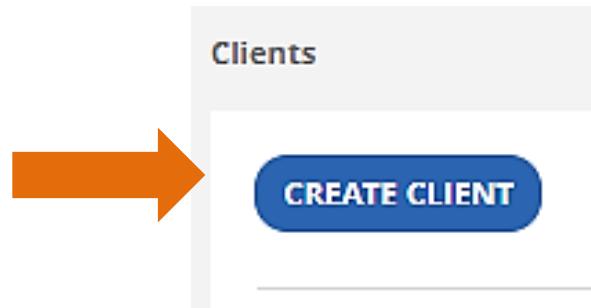
Last Name	<input type="text"/> Enter Last Name
First Name	<input type="text"/> Enter First Name
Status	Active 
Client ID	<input type="text"/> Enter Client ID
Client Payer ID	<input type="text"/> Enter Client Payer ID
Medicaid ID	<input type="text"/> Enter Medicaid ID
Program	Select Program 
Language	Select Language 
Primary Payer	Select Primary Payer 

CLEAR 



Search for Existing Client File

If client is not found, click **Create Client** button.





Search for Existing Client File

- Enter required information indicated by an asterisk (*).
- Make sure the Medicaid ID is correctly entered.
- Click **Create Client**.

New Client

*Required

Last Name*	<input type="text" value="Enter Last Name"/>
First Name*	<input type="text" value="Enter First Name"/>
Program*	<input type="button" value="Select Program"/>
Medicaid ID*	<input type="text" value="Enter Medicaid ID"/>
SSN	<input type="text" value="_____"/>
Phone	<input type="text" value="() ___-___"/>

[CANCEL](#)



CREATE CLIENT





Add Authorization Information

- Enter non-required information (no asterisk) if desired.
- Click the three dots (see arrow) to enter an address and phone number.

BACK Test, Fake FFS | Pending

Client ID: 266183 | Medicaid ID: 9999999977 | Main Address: -- | Phone No: -- | Main Emergency Contact: --

Personal Program*

Identifiers

Client ID	266183	Medicaid ID	9999999977
SSN	-	Agency ID	9999999977

Personal Information

Client Name	Fake Test		
Date of Birth	-	Gender	-
Language	English		

Addresses | Phone Numbers *

Main Address 

REQUEST DEVICE 



Complete Personal Tab

- Enter required information.
- Address Type is “O – Other.”
- Main Phone Number: Enter a client’s landline only. If no landline exists, enter 555-555-5555.
- Click Save.

Edit Address and Phone Number X

* Required

Address Label

Address Line 1* Address Line 2

Address Type* Zipcode*

City* County

State* Main Phone Number*

Active

Use as billing address

Use as main address

[+ Add number](#)

[+ Add email address](#)

[CANCEL](#) SAVE 



Complete Personal Tab

Enter landline or Voice over Internet Protocol (VoIP) phone numbers, if any, for EVV use with the client.

Add Address and Phone Number X

* Required

Address Label

Address Line 1* Address Line 2

Address Type* Zipcode*

City* County

State* Main Phone Number*

Phone 1 (Optional)

Active

Use as billing address

Use as main address

[+ Add number](#) [+ Add email address](#)

←

[CANCEL](#) [SAVE AND ADD NEW](#) SAVE



Complete Program Tab

- Click **Program** tab.
- The next slides work through the boxes as the arrows direct.

Personal **Program***

FFS - WIFFS - Not Authorized *

2 **Program Details**

Supervisor:	-
Enrollment:	-
Created Date:	07/19/2024
Effective Date:	07/19/2024
SOC Date:	-
EOC Date:	-
Eligibility Begin Date:	-
Eligibility End Date:	-
Reason For Change:	-

3 **Service Details**

No Service Added
Click button to add Service

4 **Payer Details**

Payer Name: WIFFS
Bill Rate: Default
Client Payer ID: -
Start Date: -

Medicaid ID: 9999998888
Rank: 1
Group Number: -
End Date: -

5 **Authorization Details**

No Authorization Added
Click button to add Authorization

ADD AUTHORIZATION

Complete Program Tab: Service Details

- Click **Add Service**.
- Select the **Service**.
- Add **Start Date**.
- Click **Save**.

Service Details

ADD SERVICE

Service Details

* Required

Service

Service*
Select Service

Start Date *
07/01/2024

End Date
Enter End Date

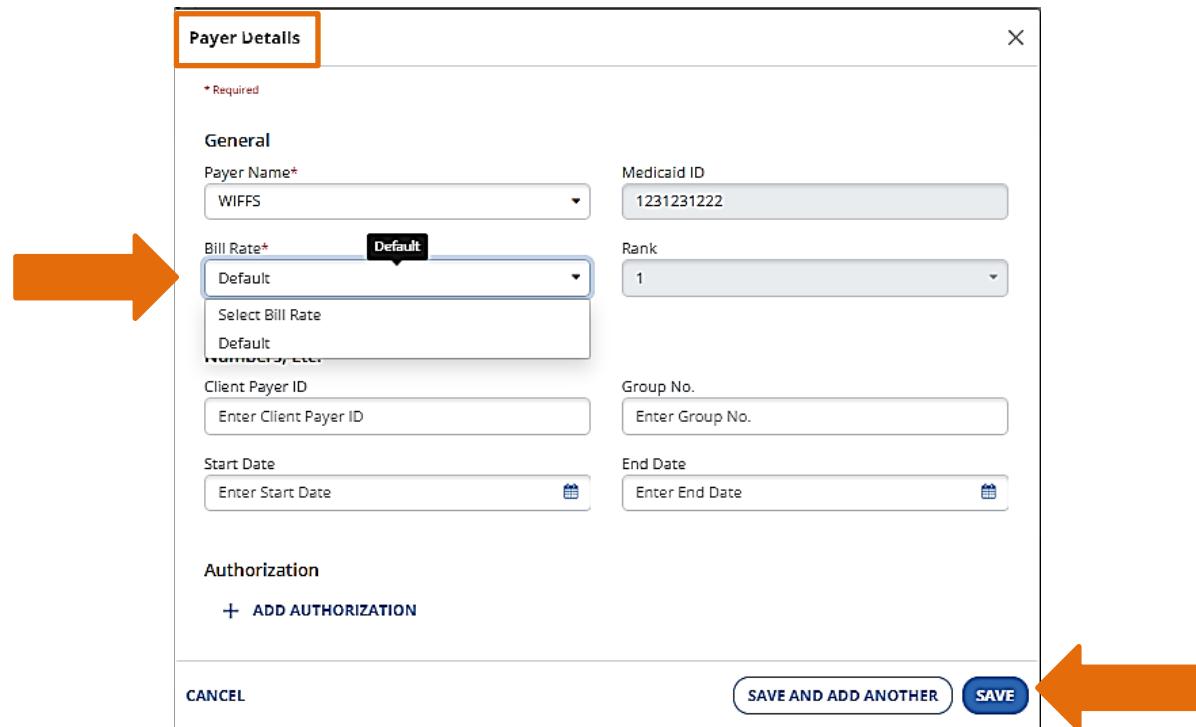
CANCEL

SAVE AND ADD ANOTHER

SAVE

Complete Program Tab: Payer Details

- Select **Payer Name**.
- Click **Bill Rate** and select Default.
- Click **Save**.



Payer Details

* Required

General

Payer Name*
WIFTS

Medicaid ID
1231231222

Bill Rate*
Default

Select Bill Rate
Default
Numbers, etc.

Rank
1

Client Payer ID
Enter Client Payer ID

Group No.
Enter Group No.

Start Date
Enter Start Date

End Date
Enter End Date

Authorization

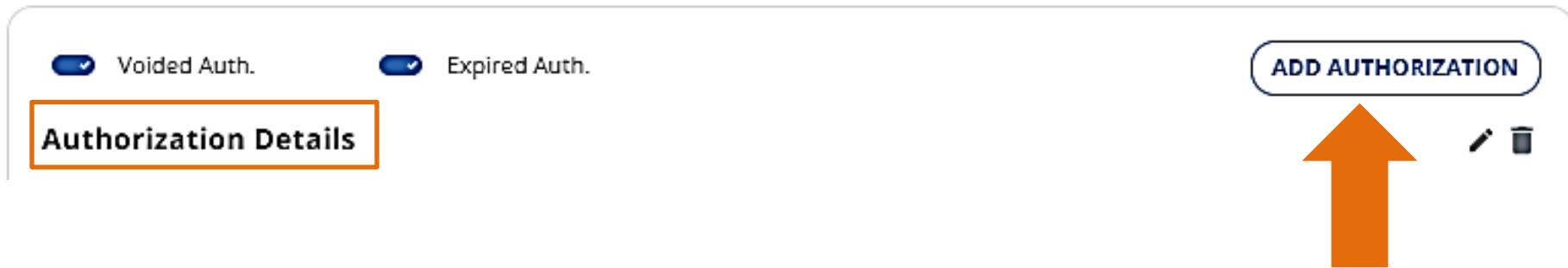
+ ADD AUTHORIZATION

CANCEL **SAVE AND ADD ANOTHER** **SAVE**



Complete Program Tab: Authorization Details

Click **Add Authorization** to add authorization information.



Note: This process will not create an actual Medicaid-approved PA. This is only providing required information to Sandata.



Complete Program Tab: Authorization Details

- Select **Payer** and **Service**.
- Keep **Event Code** as “None.”
- Select **Format**.
- Set **Start Date** to cover the service start date.
- Set **End Date** (up to 06/06/2079).
- Click **Save**.

Authorization Details

*Required

General Info

Payer*

Service*

Event Code*

Modifiers: 1: 2: 3: 4:

Format*

Voided

Date Range

Start Date*

End Date*

Comments
Write your comments here...

Authorization Limitation

Visits or Authorization Allowed

Unlimited Has Limitations

CANCEL **SAVE AND ADD NEW** **SAVE**





Complete Program Tab: Authorization Details

The authorization information will start with "AMP" to show it was manually created.

Voided Auth. Expired Auth.**ADD AUTHORIZATION**

Authorization Details

Payer: WIFFS
Service: T1019
Event Code: NONE- None
Start Date: 07/01/2024
Comment: -

Authorization No: AMP20240719T195442690
Modifiers: -
Format: Hours
End Date: 06/06/2079



Maintaining Information

If an approved PA for the service from the **same** payer is received in the future, Sandata will end date this manually created authorization information. This prevents overlap of service information.

Voided Auth. Expired Auth.

ADD AUTHORIZATION

Authorization Details

Payer: WIFFS

Service: T1019

Event Code: NONE- None

Start Date: 07/01/2024

Comment: -

Authorization No: AMP20240719T195442690

Modifiers: -

Format: Hours

End Date: 07/19/2024



Maintaining Information

If an authorization is received from **another** payer, the provider must end date this manually created Sandata information.

- Click the edit pencil.
- Change the end date.
- Click **Save**.

Voided Auth. Expired Auth.

Authorization Details

Payer: WIFFS	Authorization No: AMP20240719T195442690
Service: T1019	Modifiers: -
Event Code: NONE- None	Format: Hours
Start Date: 07/01/2024	End Date: 07/19/2024
Comment: -	

ADD AUTHORIZATION 



Apply Your Knowledge

True or False?

- Non-PAL independent nurses have no administrative role in EVV.
- Non-PAL independent nurses can end-date authorization information as 06/06/2079.



False

True



Call to Action



Make sure all the clients you're expecting to be in the Sandata EVV Portal are there.

Confirm that client addresses and any landline phone numbers are accurate in the Sandata EVV Portal.



EVV: Home

What's New

Members

IRIS

Providers and Independent Nurses

Payers

Alternate EVV

Training

Resources and FAQs

Contact Us

Electronic Visit Verification (EVV): Administrator Training

Administrator training

The resources on this page help administrative staff, including independent nurses, learn to use the Sandata EVV portal. You can also use these resources to guide you, step-by-step, in EVV processes. Use a combination of resources that makes the most sense for your needs: video, presentation, or written materials.

Administrator FAQs

View additional frequently asked questions and their answers, including those about EVV and claims, on the [EVV FAQ webpage](#).

[Close all](#) [Open all](#)

How do I get a Sandata EVV portal link, username, and password?

How do other administrators get trained?

How do I train workers to use EVV?

How do I request training materials in other languages?

Where do I find out about DHS EVV policy?

[Close all](#) [Open all](#)

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Administrator tutorials and refreshers

[Close all](#) [Open all](#)

Information for new EVV administrators

Getting started: ForwardHealth Portal

Getting started: Sandata EVV portal

Client data entry: Adding and editing clients

Employee data entry: Adding and editing workers

Visit methods: Sandata Mobile Connect, Telephonic Visit Verification, Fixed Visit Verification

Visit maintenance and clearing exceptions in Sandata

Curious for more?

Here's where you can find it.

Resource Title and Languages Available

[Sandata Electronic Visit Verification Portal: Modify Client Data, P-02749, in English, Hmong, Spanish](#)

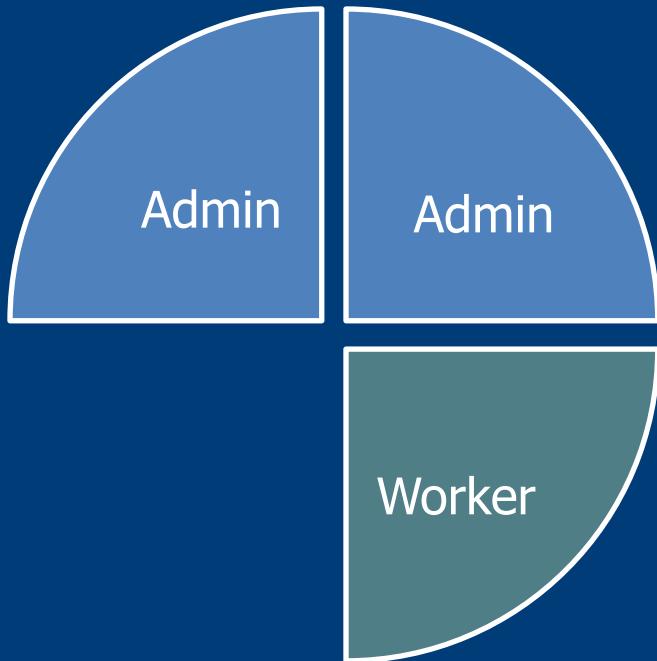
[How to Change Client Status and Start of Care Date in the Sandata EVV Portal, in English](#)

[How to Add an Address and Phone Number in the Sandata EVV Portal, in English](#)

[Adding Required Authorization Information in the Sandata EVV Portal, P-03550 \(PDF\), in English](#)

www.dhs.wi.gov/evy/training-administrators.htm





Checking In and Out



Your Role as Worker



www.dhs.wi.gov/evv/index.htm



Your Role as Worker

SMC App

Cell phone or tablet



Telephonic Visit Verification (TVV)

Landline at client's home



Fixed Visit Verification (FVV)

Device at client's home





Worker Visit Card

Wisconsin Electronic Visit Verification

WORKER VISIT CARD

Wisconsin EVV Customer Care

📞 833-931-2035 📩 vdxc.contactevv@wisconsin.gov 🕒 Monday - Friday 7am-6pm

Agency's Sandata toll-free number:

Agency/Company ID:

Worker Santrax ID:

Sadata Mobile Connect Username:

Client Identifier:

Service Code(s):

Is recording tasks within EVV required? Yes No

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

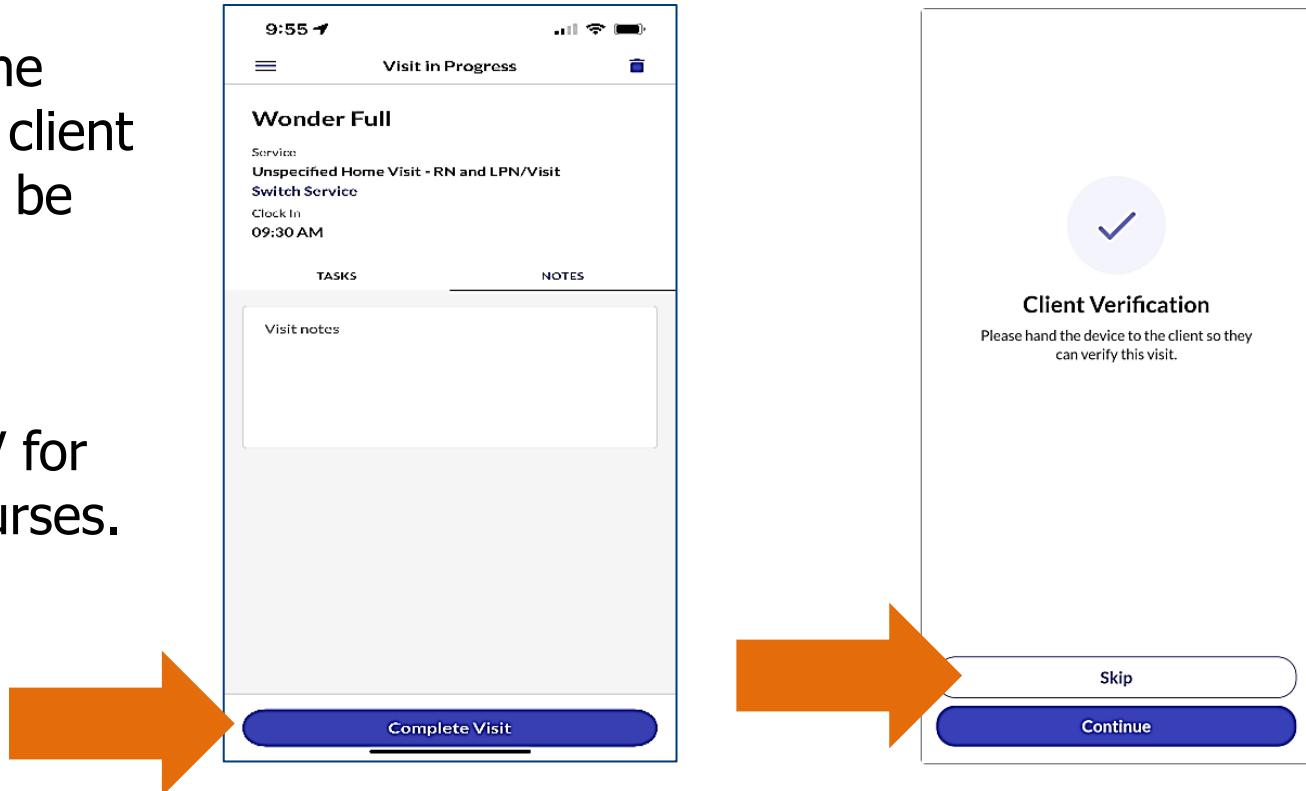
www.dhs.wi.gov/library/collection/p-02844



Tasks and Client Verification

At the end of the visit, tasks and client verification can be skipped.

These are not required in EVV for independent nurses.





Apply Your Knowledge

True or False?

- Independent nurses need to check in and out using EW.
- Independent nurses don't need to submit tasks and client signatures through EW.



True

True



Call to Action



Review the EVV Training Workers webpage resources, as needed.

Make sure you have the information you need for a visit written on a Worker Visit card or other reference tool.



Curious for more?

Here's where you can find it.

The Training Workers webpage has videos and PowerPoints:

- General EVV information
- SMC app use
- TVV use
- FVV use

www.dhs.wi.gov/evv/training-workers.htm

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Electronic Visit Verification (EVV): Training Workers

These resources will help train anyone who will use the Sendaia EVV system to check in and out of visits, including workers and independent nurses.

There are three methods to choose from:

- Sendaia Mobile Connect (SMC) app uses a smartphone or tablet.
- Telephonic visit verification (TVV) uses the client's landline phone.
- Fixed visit verification (FVV) uses a small device ordered from Sendaia, followed by a phone call.

You can choose whichever method works best. You can check in with one method and check out using another, if needed.

For the most reliable way to check in and out of visits, download the SMC app to your smartphone or tablet. Simply search for "Sendaia Mobile Connect" in the device's app store and look for this dark blue logo.



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 evv.customer@wisconsin.gov Monday-Friday, 7 a.m.-8 p.m. Central Time.

FAQs for worker training

Which resources should I use?

How do I put together a training plan for workers?

How do I request training materials in other languages?

Worker resources

Getting started

Sendaia Mobile Connect (SMC) app resources

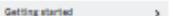
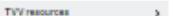
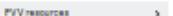
Group visit resources

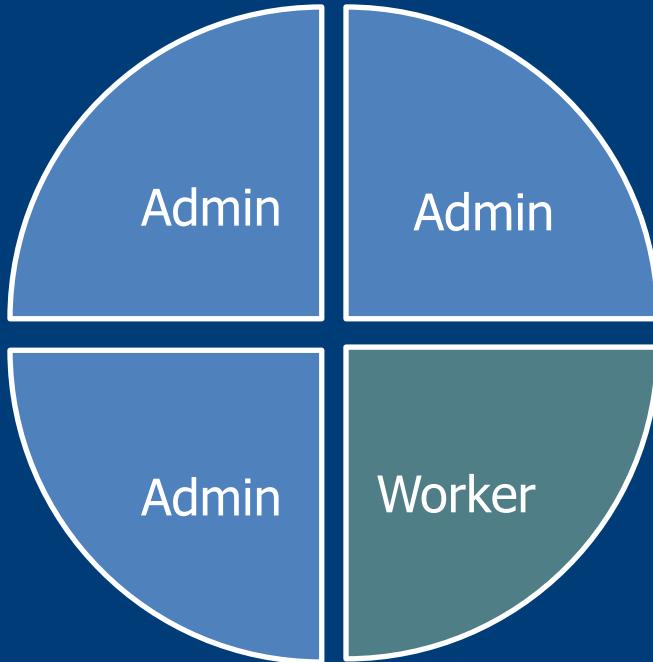
Telephonic visit verification (TVV) resources

Fixed visit verification (FVV) resources

How can I get help?

Contact Wisconsin EVV Customer Care at evv.customer@wisconsin.gov, or call 833-931-2035 for help with all EVV questions.



Using Visit Maintenance



Lifecycle Flyer

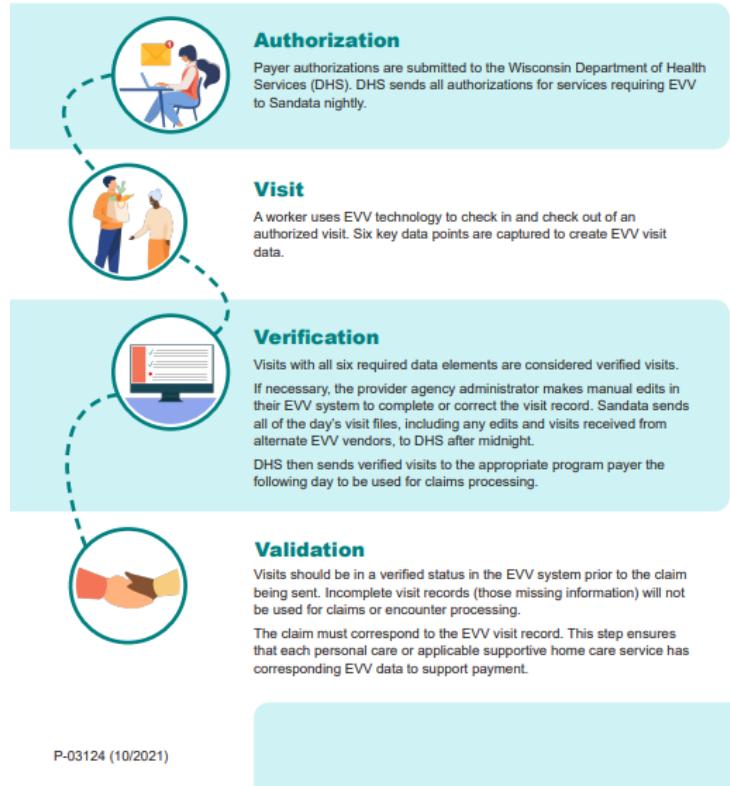
Make sure the EVV visit is in a “verified” status on the Sandata EVV portal before you send the claims.



www.dhs.wi.gov/publications/p03124.pdf

How does the electronic visit verification record fit into the general claims process?

This overview provides a snapshot of how an electronic visit verification (EVV) visit record fits into the general claims process. Additional details about each step are provided on the following page.

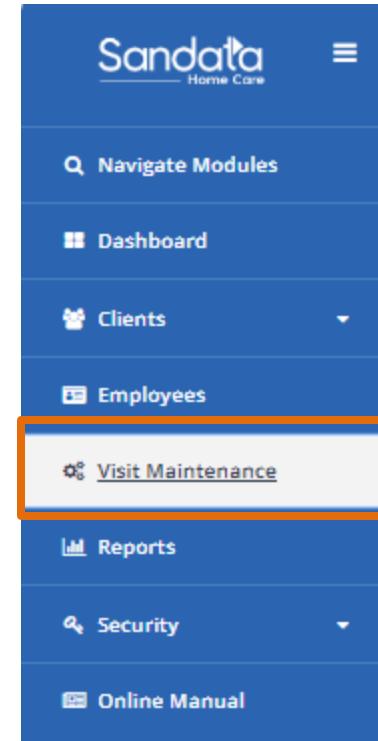




Visit Maintenance

Visit Maintenance is the area of the Sandata EVV portal where visits are:

- Viewed in near real-time.
- Corrected and cleared of exceptions (errors).
- Confirmed to be in a “verified” status prior to submitting claims.





Visit Maintenance

Click on Filters.

Visit Maintenance / Manage Visits

Account: 91031 []

Enter agency

LOG OUT

CREATE VISIT

CREATE CALL

There are no records matching the provided search criteria

FILTERS

Sodata Home Care

Navigation Modules:

- Dashboard
- Clients
- Employees
- Visit Maintenance
- Reports
- Security
- Online Manual



Visit Maintenance

- Add search criteria.
- Click Apply Filters.

Filters

From Date *	07/22/2024	
To Date *	07/22/2024	
Client	Enter Client	
Employee	Enter Employee	
Payer	Select Payer	
Program	Select Program	
Service	Select Service	
Category	Select Category	
Visit Status	Select Visit Status	
Client Medicaid ID	Enter Client Medicaid ID	
Filter Visits By	All Visits	
Exception Types *	Select Exception Types	
Call Type	Select Call Type	
Employee Other ID	Enter Employee Other ID	
Supervisors	Select Supervisors	
Department	Select Department	
Group Visit Code	Select Group Visit Code	

CLEAR

APPLY FILTERS

RESET

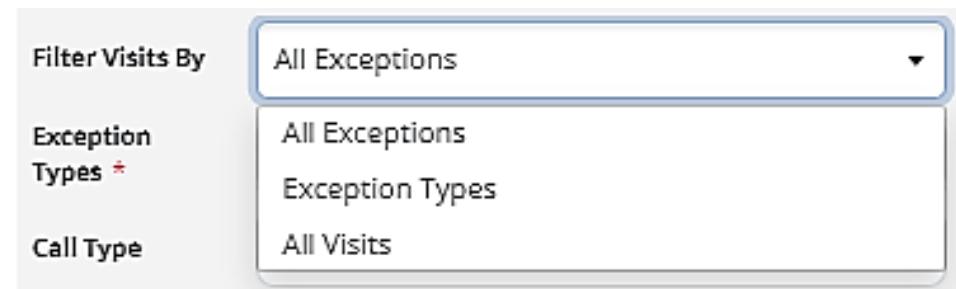
SAVE SETTINGS



Visit Verification

Use the **Filter Visits By** field to choose visits including:

- All Exceptions
- Exception Types
- All Visits (recommended)





Fix an Exception

Santrax ID: 000509512							
CLIENT NAME	Employee	Employee ID: 509512	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT
CLAMMERTON, CLAMMY	Sc [REDACTED] jni			Nursing Assessment or Eval/Visit	07/09/2024	10:49 AM	●
Adams, John	Caregiver, Amber			Home Health Aide or CNA/Visit	07/03/2024	10:49 AM	●
●	Caregiver, Amber			Personal Care Svc/15min	06/19/2024	12:42 PM	●
Foundations, Sample	Caregiver, Martha			PCS Nurse Supervisory Visit/Visit	06/18/2024	08:00 AM	02:00 PM
Adams, John	B [REDACTED] ain			Personal Care/Day	06/12/2024	04:00 AM	06:00 AM
BILL [REDACTED]	B [REDACTED] ain			Unspecified Therapeutic Procedure - OT/Visit	06/12/2024	08:00 AM	10:00 AM
CLAMMERTON, CLAMMY	B [REDACTED] ain			Nursing Assessment or Eval/Visit	06/12/2024	02:00 AM	04:00 AM
(949)491-6758					06/12/2024	02:41 PM	●
Adams, John	B [REDACTED] ain			Home Health Aide or CNA/Visit	06/11/2024	04:00 AM	06:00 AM



Visits Without Out-Calls



Fix an Exception

Enter the missing call information.

Select a reason code and resolution code from the drop-down menus.

Click Add.

The screenshot shows a user interface for adding a manual call. The top section, 'Add Manual Call', has several fields with validation errors highlighted by an orange border:

- Call Date MM/DD/YYYY ***: The input field is empty, and the placeholder 'MM/DD/YYYY' is visible.
- Call Time HH:MM AM/PM ***: The input field contains '08:56 AM'.
- Location ***: The input field is empty, and the placeholder 'Select Location' is visible.

Below this section, a 'Service' dropdown and a 'Time Zone' dropdown are shown. The 'Time Zone' dropdown is set to 'America/Chicago'.

A large orange arrow points down to the 'Reason Code' section, which is also highlighted with an orange border:

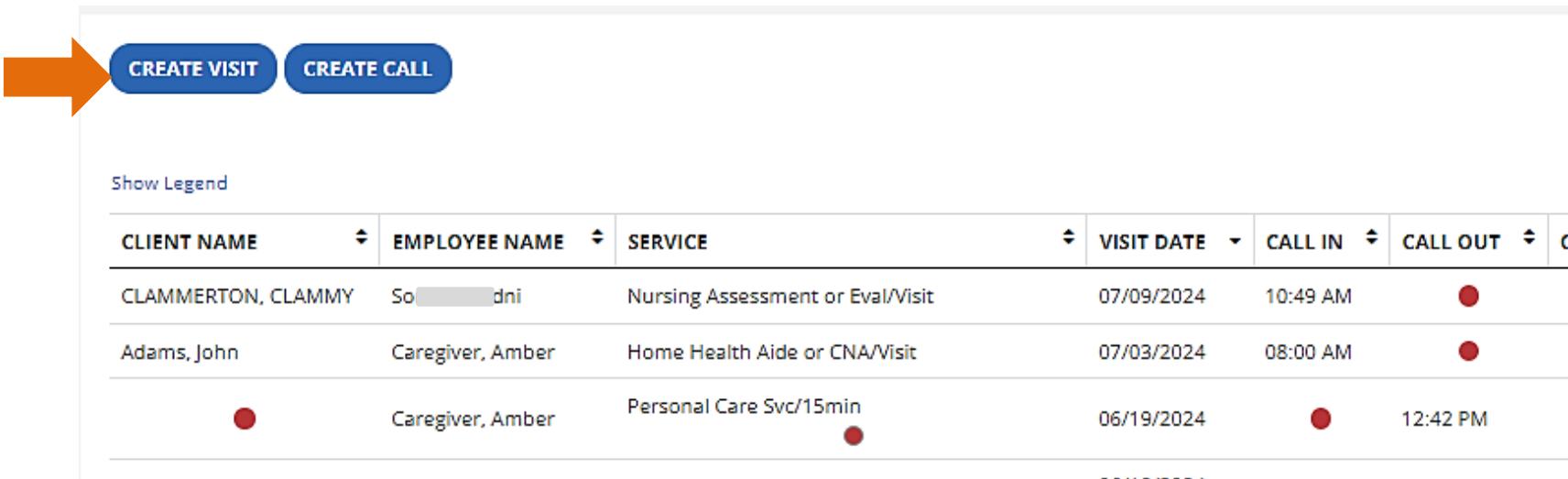
- Reason Code ***: The input field is empty, and the placeholder 'Select Reason Code' is visible.
- Resolution Code**: The input field is empty, and the placeholder 'Select Resolution Code' is visible.
- Reason Note**: The input field contains 'Enter Reason Note'.

At the bottom right of the 'Reason Code' section is a blue 'SAVE' button.



Create a Missing Visit

Add a forgotten visit with the **Create Visit** button.



The screenshot shows a software interface for managing visits. At the top, there is a blue header bar with two buttons: 'CREATE VISIT' and 'CREATE CALL'. An orange arrow points to the 'CREATE VISIT' button. Below the header is a 'Show Legend' link. The main area is a table with columns: CLIENT NAME, EMPLOYEE NAME, SERVICE, VISIT DATE, CALL IN, CALL OUT, and a status column. The table contains three rows of visit data. Each row has a red circular icon in the first column and a red dot in the status column.

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	
CLAMMERTON, CLAMMY	So [REDACTED] dni	Nursing Assessment or Eval/Visit	07/09/2024	10:49 AM	●	
Adams, John	Caregiver, Amber	Home Health Aide or CNA/Visit	07/03/2024	08:00 AM	●	
●	Caregiver, Amber	Personal Care Svc/15min	06/19/2024	●	12:42 PM	



Apply Your Knowledge

True or False?

- Exceptions show where information is needed.
- Corrections can be made in the Sandata EVV portal, including adding an entire visit that was forgotten.



True

True



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[Where do I find out about DHS EVV policy?](#)

Electronic Visit Verification (EVV): Administrator Training

Administrator training

The resources on this page help administrative staff, including independent nurses, learn to use the Sandata EVV portal. You can also use these resources to guide you, step-by-step, in EVV processes. Use a combination of resources that makes the most sense for your needs: video, presentation, or written materials.

Administrator FAQs

View additional frequently asked questions and their answers, including those about EVV and claims, on the [EVV FAQ webpage](#).

[Close all](#) [Open all](#)

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[Visit maintenance and clearing exceptions in Sandata](#)

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Curious for more?

Here's where you can find it.

Resource Title and Languages

[EVV Visit Maintenance, P-02754, in English, Hmong, Spanish](#)

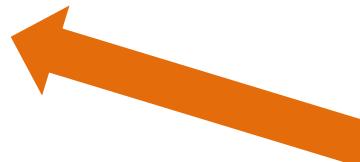
[Refresher Training: Overview of Visit Maintenance, in English](#)

[Refresher Training: Visit Maintenance and Call Edits, in English](#)

[Refresher Training: Visit Maintenance and Clearing Exceptions, in English](#)



www.dhs.wi.gov/evv/training-administrators.htm





Common EVV Questions



EVV and Rounding

Private Duty Nursing (Service Codes 99504, S9123, S9124)

- EVV systems use the same rounding logic required for providers in ForwardHealth policy.
- EVV visit units must be **equal to or greater than** the units on the claim detail, or the claim will be denied.

Example:

Worker checks in early—7:45 a.m.

Checks out late—4:05 p.m.

- Units billed for = 8 units
- EVV visit units = 8.3 units

EVV units may be equal to or greater than number of units being billed.



EVV Information Transfer and Billing

- It can take up to two days for EVV information to get from Sandata to the payer.
- In fee for service, if you submit an invoice before EVV information transfers:
 - Your claim will suspend for two days and then re-check for EVV data.
 - If EVV data is found, the claim will pay.
- **Best practice:** Before you bill, make sure the EVV visit is in a verified status in the Sandata EVV Portal. Ideal timing to submit an invoice is two days after the service is provided.



EVV Fee-for-Service Claim Processing

Explanation of Benefit Codes for EVV

Take action!

EOB Code	What it means	What you can do
1047	EVV visit not found	Ensure a “verified visit” in Sandata EVV Portal. Resubmit the details that denied.
1048	EVV units do not meet requirements of visit	Compare the EVV time to the billed units, and make corrections. Resubmit the details that denied.



Fee-for-Service Claims Resources

- [ForwardHealth Portal Resubmitting a Denied Claim](#): Searching for, making changes to, and resubmitting a claim
- [ForwardHealth Portal Claim Status Information](#): Searching for a claim and viewing the status of Pay, Deny, Suspend, Adjust
- ForwardHealth Provider Services Call Center:
800-947-9627
Monday through Friday, 7 a.m.–6 p.m. Central time
Enrollment, policy, and billing questions
- ForwardHealth [provider relations representatives](#): Assist with complex billing and claims processing questions



Apply Your Knowledge

True or False?

- If a claim is denied, there's nothing that can be done.
- The EVV visit should show a length equal to or greater than what is on the claim.



False

True



Call to Action



Become familiar with your RAs and EOB codes.

Get answers to your questions.



Curious for more?

Here's where you can find it.

Resource Title and Languages

[Fee-for-Service EVV Administrator Training: Claim Edits, in English](#)

[Fee-for-Service EVV Administrator Training: Claim Edits, P-03570, in English, Hmong, Spanish](#)

www.dhs.wi.gov/evv/training-administrators.htm

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[EVV and claims \(billing\)](#)

[Sandata reports for business needs](#)

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Next Steps



Best Practices

- Confirm (PALs) or add (non-PALs) client authorizations in your EVV system in a timely manner. Make sure client information in Sandata is complete and accurate.
- Review EVV visits in the Sandata EVV Portal regularly to look for errors and missed visits.
- Correct exceptions, and confirm all visits are in a verified status before submitting claims outside EVV.



Next Steps

- Be patient.
- Ask questions.
- Take advantage of EVV support.
- Review and use EVV resources.
- Elevate concerns.





Keep in Touch

- Watch your emails from Sandata and DHS.
- Contact EVV Customer Care for questions and personalized support.
- Arrange for office hours with EVV Customer Care.

Have questions? Need help?

Wisconsin EVV Customer Care is available at

833-931-2035 or

vdxccontactevv@wisconsin.gov Monday-Friday, 7 a.m.-6 p.m. Central Time.

Thank You

Thank you for the important services you provide to members.