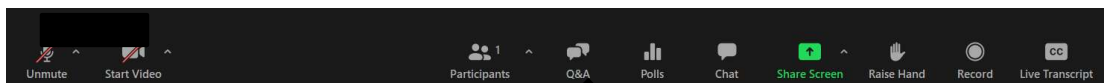# Electronic Visit Verification and Independent Nurses

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

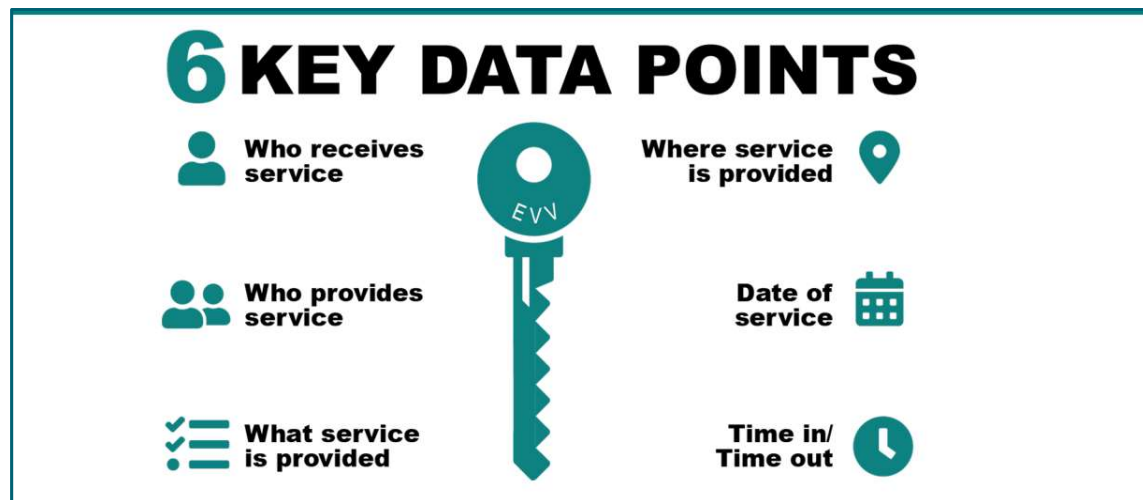We'll have some quiz questions and To-Do items for you as we go today!

Conversation Guidelines

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

EVV Basics

EVV Basics

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

In 2016, the 21st Century Cures Act, a federal law, was passed. The law requires every state, including Wisconsin, to implement EVV for Medicaid-covered personal care and home health care services. If we don't follow this federal law, Wisconsin will lose money for Medicaid services. EVV is an electronic system that uses technology to make sure that members 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 21st Century Cures Act requires that the EVV system captures six key pieces of information. This information will sound similar to what is in an authorization:
- Who receives the service (the client)
- Who provides the service (in this case, this is you as a business, and you as a worker)
- What service or services are provided
- Where the service is provided
- The date of service
- The time the service begins and ends

One point I'd like to emphasize here is that Wisconsin's EVV solution does **not** monitor or track a worker's location throughout the visit. Location is only captured at the start and end of a visit.

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)	

These codes require use of an EVV system. We put an orange box around the codes that are the most applicable to you as independent nurses.

EVV Basics

Are independent nurses "providers"? Yes.

Find steps for preparing for EVV on the Wisconsin Department of Health Services (DHS) EVV Providers webpage:

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

Let's address a common question here at the start: Are independent nurses "providers"?

Yes. Independent nurses are "agencies of one." Because you provide the services and submit your own billing, your role in EVV will be worker and administrator. Information on the DHS EVV webpage applies to independent nurses.

Whether you choose the DHS-provided Sandata system or an alternate EVV vendor, providers (including independent nurses) should complete the steps listed on the DHS EVV Providers webpage.

We'll look at some of these steps in the upcoming slides.

Our best advice: Don't back yourself into a corner. Start early and practice, ask questions, and establish new routines. This is the intention of soft launch: practice, practice, practice! Those who do so are in a much better position for success.

Two Roles of Independent Nurses

Administrator
ForwardHealth Portal and
Sandata EVV Portal

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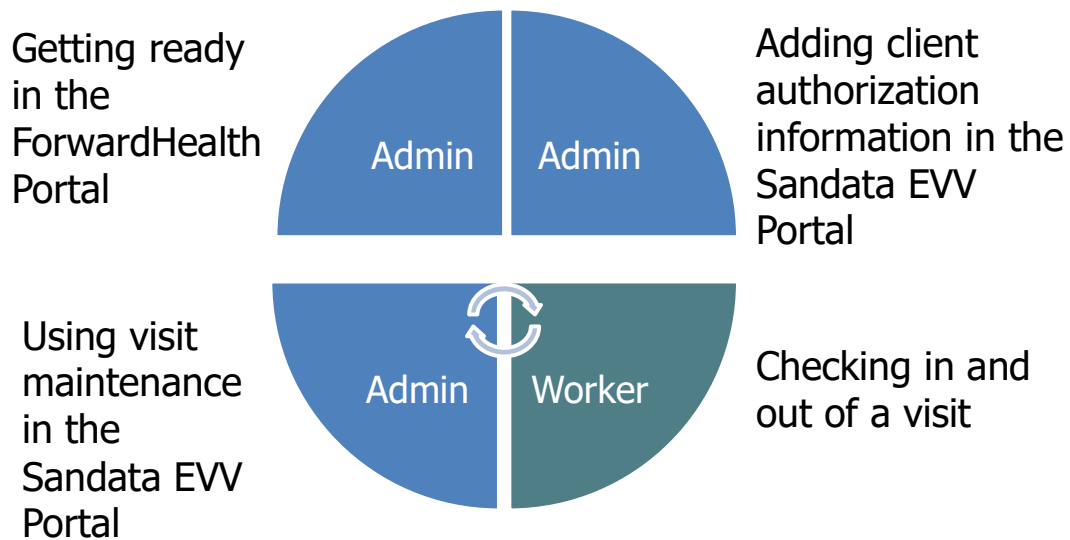Sandata Mobile Connect (SMC) app
(or other method)

Independent nurses, you have two roles in your work life:

As a business owner and administrator in EVV, you make sure your business is ready to provide required EVV information. You verify that the EVV visit information is correct, or fix it, in the Sandata EVV Portal. Your work here is on a tablet, laptop, or desktop computer using the ForwardHealth Portal and Sandata EVV Portal.

You are also a worker, providing hands-on nursing care to clients. For EVV, this means you check in and out for your visits using one of the three Sandata methods.

You are already well-acquainted with these two roles and their different sets of tools. You'd not use a stethoscope to file your business taxes, for example! Similarly, the Sandata EVV Portal and Sandata Mobile Connect app are specifically assigned to your different roles. We'll go over both today.

Two Roles of Independent Nurses

Getting ready in the ForwardHealth Portal

Admin | **Admin**

Adding client authorization information in the Sandata EVV Portal

Using visit maintenance in the Sandata EVV Portal

Admin | **Worker**

Checking in and out of a visit

Here's another way of looking at the two roles in EVV and when they're used.

The top two categories, in your administrator role, are "one and done":
  Getting ready in the ForwardHealth Portal
  Adding client authorization information in the Sandata EVV Portal

The bottom two categories will become the new routine in EVV:
 Checking in and out of a visit
  Using visit verification in the Sandata EVV Portal

We will go through all four categories today, adding one piece of this EVV pie to your plate at a time.

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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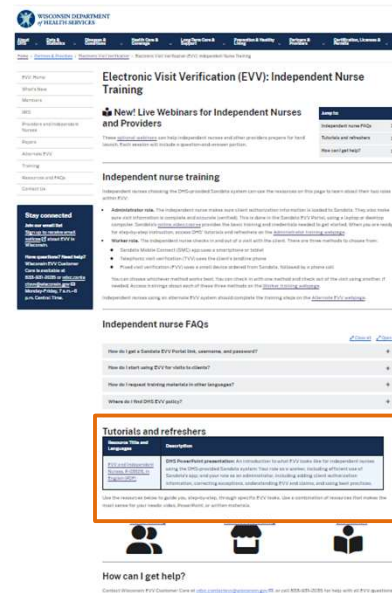
We've added a webpage specific to trainings for independent nurses to give you a more organized approach to EVV. It address the two roles.

Like other types of providers, you will need to complete the initial training and set up your EVV system. Like other providers, you will need to add workers (just you!). And like other providers and workers, you may need to access tutorials and refreshers for EVV processes.

This webpage puts all of these resources at your fingertips. There is always our EVV Customer Care team, too, to coach you through any uncertainties you may have.

We've also included today's presentation on this webpage. You'll see it in the "Tutorials and refreshers" section, shown here with an orange box.

Most importantly: Give yourself time to learn and adjust. With practice, what may at first seem overwhelming will become second nature.
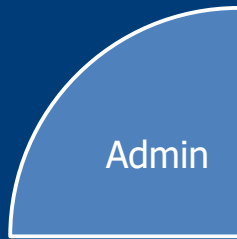
Getting Ready in the ForwardHealth Portal

Admin

Let's start by looking at the ForwardHealth Portal, an administrative tool you are likely familiar with already. It's the first piece of the pie, as you see here. When you've completed this category once, it is done.

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.

Independent nurses should make sure their email information is accurate in the secure ForwardHealth Portal. Why? Whatever email address is listed on the ForwardHealth Portal is the one that Sandata will recognize and confirm as your business.

A provider's Medicaid ID (MA ID) also serves to confirm the provider or independent nurse when they start EVV administrative training. The MA ID is found on an independent nurse's Remittance Advice. It is eight or nine digits long.

Some independent nurses may know their 10-digit National Provider Identifier. For EVV, however, only the MA ID should be used to access Sandata's EVV trainings. The NPI will not be recognized in Sandata's system. Only the MA ID is sent to Sandata.

ForwardHealth Portal Account
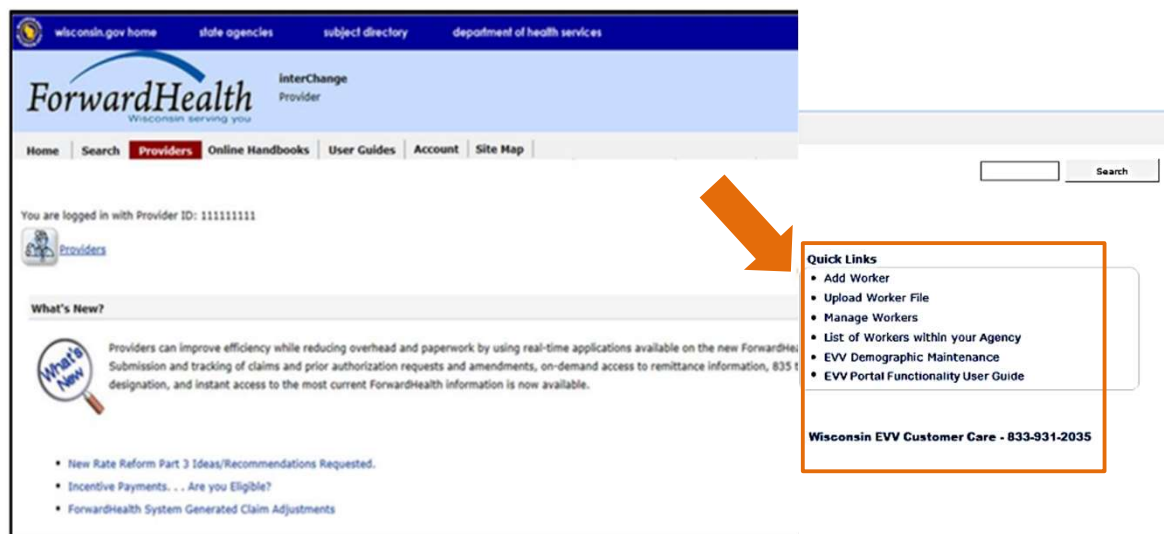
To prepare for EVV in your ForwardHealth Portal account:
- Make sure your contact information is up to date.
- Add yourself as a worker.

Some of you may want to do this with us now. If you have a computer screen available to do so, feel free to log in to your ForwardHealth Portal. Some of you may prefer to focus on the slides and follow up later— whichever way you'd like to learn is fine.

The links for each task is in the Quick Links box on your secure ForwardHealth homepage.

You may need to scroll down to find it in that right column.

Let's take a brief look at each task, starting with EVV demographic information—your contact information. You can see the EVV Demographic Maintenance option near the bottom of the highlighted box.

EVV Demographic Maintenance

Make sure your business information is up to date.
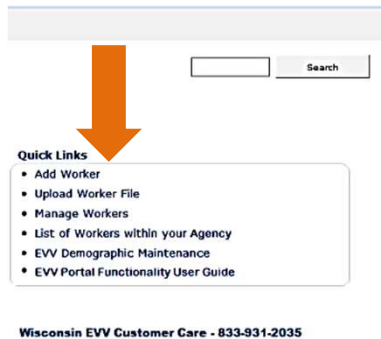

Using the EVV Demographic Maintenance link, check to be sure your business information is up to date and make any needed corrections. The Mailing Address section determines where communication to your business is sent. Enter your name in the "Attention Line." Then, make sure an accurate email address is entered.

DHS will send out important provider-specific announcements about training and policy to this email. The initial training invitation and EVV welcome packet will be emailed from Sandata to providers based on the email address used here. Make sure it's accurate!
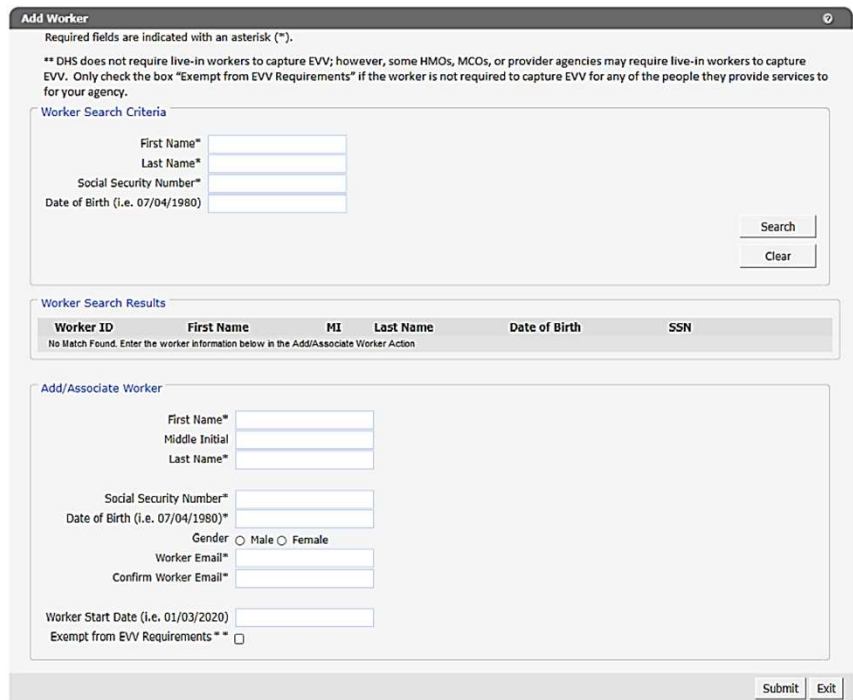
Add Worker

Add yourself as a worker.

The second task is to add yourself as a worker. This connects the EVV information you collect during visits to your ForwardHealth Portal, so claims get paid.
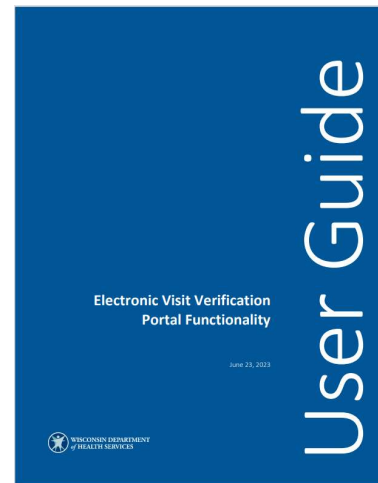
Use the Add Worker link. You'll need to identify yourself by your second role—your "worker" role—and add "Worker You" to your business.

This is the screen you'll access. You can see the information is very basic: Your name, Social Security number (SSN), and date of birth helps the system make sure it's identifying the correct person. The SSN is not sent to Sandata or other entities to protect personal information.

An email address is also required. It should be an email address only you use since it will become your user ID as a worker in the Sandata system. It can be the same email or a different email as the one you listed for your business.

EVV Portal Functionality User Guide

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

User Guide

Electronic Visit Verification
Portal Functionality

June 23, 2023

WISCONSIN DEPARTMENT
of HEALTH SERVICES

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

These steps (making sure your business information is accurate and adding yourself as worker) are reviewed in detail in the EVV Portal Functionality User Guide. You can get there using the QR code or weblink on this page. There's also a video on our EVV Training Administrators webpage if that's the way you learn best.

To use the QR code: open your smartphone camera and hover it over the square. A text box should pop up. Tap that text box. It will take you directly to this resource.

For those two tasks in ForwardHealth:
Chapter 6 walks through the demographic maintenance tool, where you can make sure your business email address is correct.
Chapter 7 walks through worker association, where you can add yourself as a worker to your business.

Apply Your Knowledge

True or False?

- Independent nurses can use the same trainings and resources as other providers.

True

- Since they don't have any employees, independent nurses don't need to enter workers in the ForwardHealth Portal.

False

Let's pause here for an informal quiz:

Independent nurses can use the same trainings and resources as other providers.
TRUE: As an "agency of one," you are a provider! All the same resources apply to you.

Since they don't have any employees, independent nurses don't need to enter any workers in the ForwardHealth Portal.
FALSE: Your employee is yourself! Be sure to enter your "Worker Self" and link/associate to your business in the ForwardHealth Portal.

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.

Please make note of these important items to do. If you didn't take these steps along with us today, here is a reminder of the steps to take after the training.

Confirm your business email address in the ForwardHealth Portal.

Locate your MA ID (not NPI). Call EVV Customer Care if you need help.

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 Non-Medicaid Providers Apply for an EVV Unique Provider ID, in English ⊙ |
| How to Create and Maintain EVV Worker IDs, in English ⊙ |

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

Curious for more?

We've got it! Please go to our Administrator Training webpage.

The Getting Started: ForwardHealth Portal section is a great resource! It has a user guide for ForwardHealth as well as a video training for How to Create and Maintain EVV Worker IDs.
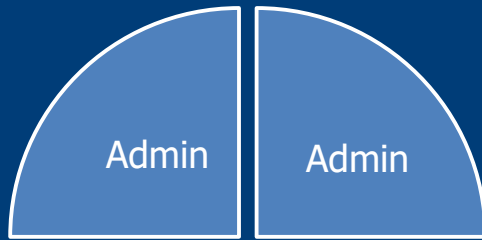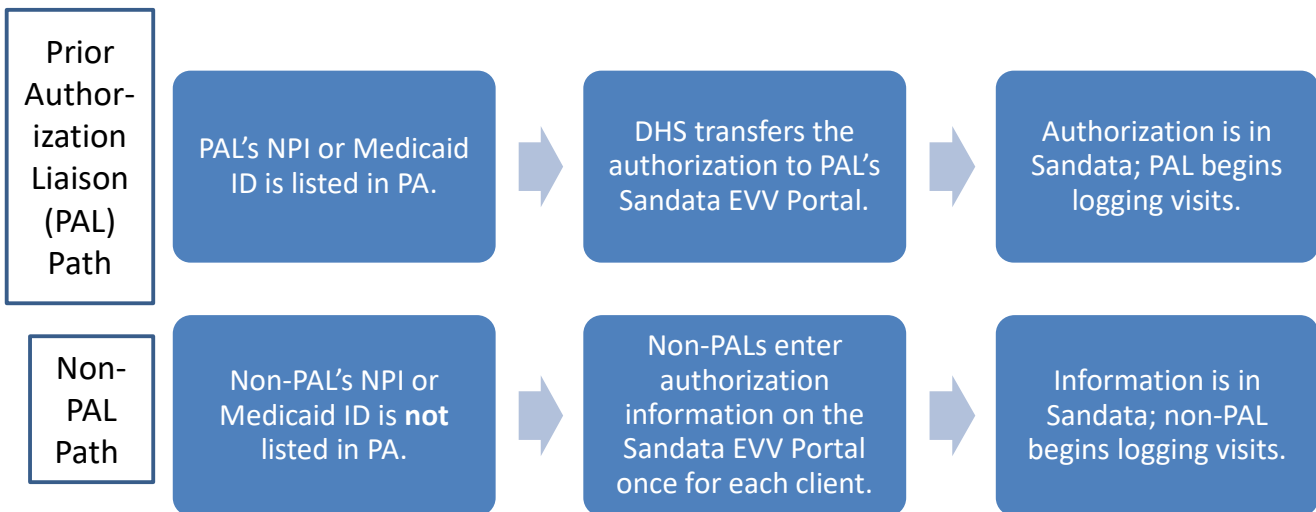
Adding Authorization Information

Let's move to the second piece. For each client you support, this will be "one and done."

This section will be important for independent nurses who are NOT prior authorization liaisons (PALs).

PALs and EVV Authorization Information

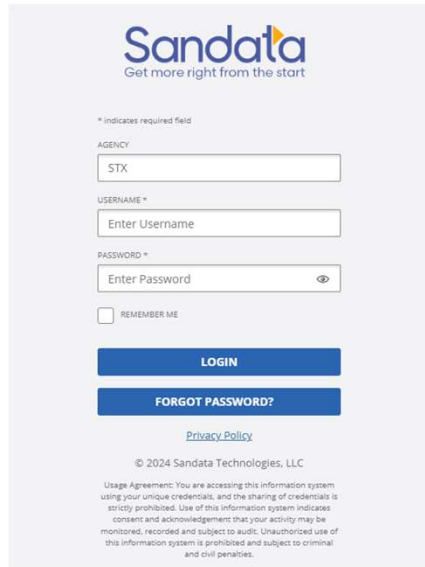| Prior Author-ization Liaison (PAL) Path	PAL's NPI or Medicaid ID is listed in PA.	→	DHS transfers the authorization to PAL's Sandata EVV Portal.	→	Authorization is in Sandata; PAL begins logging visits.
Non-PAL Path	Non-PAL's NPI or Medicaid ID is **not** listed in PA.	→	Non-PALs enter authorization information on the Sandata EVV Portal once for each client.	→	Information is in Sandata; non-PAL begins logging visits.

Authorizations flow from DHS to Sandata. Though our PDN codes (99504, S9123, and S9124) always require a PA with ForwardHealth, the authorization field that feeds into the Sandata EVV Portal only includes the PAL's Medicaid ID or NPI. Therefore, only the PAL's Sandata EVV Portal is automatically populated with the client information. We see this series of steps on the top line of this slide.

The non-PAL's path is listed on the bottom row. Non-PALs will need to manually enter in the client and authorization information to their Sandata EVV Portal. This is a one-time task.
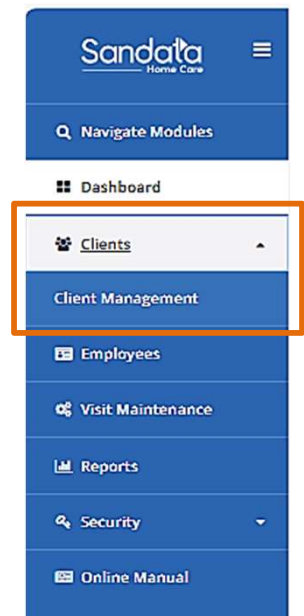
We are here to help if you encounter any challenges in doing so.

Search for Existing Client File

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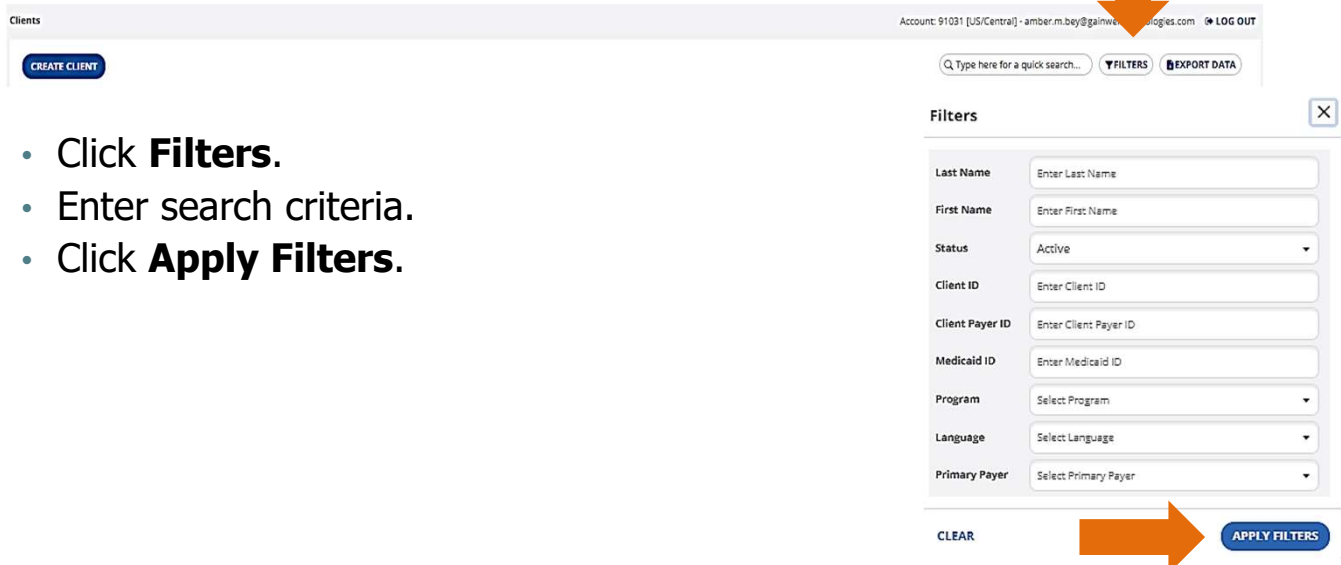- From the navigation panel, click **Clients** then **Client Management** to access client records.

Always search for the client first to be sure you're not creating a duplicate file. For example, if the client was served by your provider agency in the past, they would still be found in the client list and may only need updating.

First, log in to the Sandata EVV Portal.
From the navigation panel, click Clients.
Then click Client Management to access client records.
The Clients search screen will be displayed (on next slide).

Search for Existing Client File

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

In the top right of the screen, click Filters. Then enter the search criteria. You can leave all the fields blank to get a full list of all clients if you prefer. Click Apply Filters to find any matching records.

If you are the PAL and the client's information is not here as you expected, your next step is to check on the authorization's status with the payer.

If you are a non-PAL, your next step is to add the client's authorization information to Sandata. We'll go through that next. Remember, this is "one and done" for a client.

Search for Existing Client File

If client is not found, click **Create Client** button.
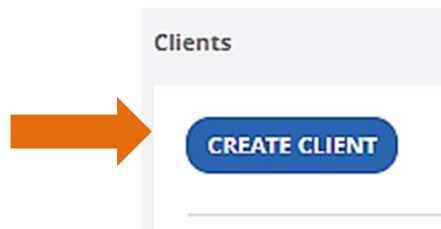
For non-PALs: If no match is found, click Create Client.

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*	Enter Last Name
First Name*	Enter First Name
Program*	Select Program ▼
Medicaid ID*	Enter Medicaid ID
SSN	___-__-____
Phone	(__) ___-____

CANCEL   **CREATE CLIENT**

✓ **Success**   ✕
A new client has been successfully created!

Enter required data indicated by an asterisk (*).
To prevent issues in the future, make sure to double check that the Medicaid ID is entered correctly.
Click Create Client.

The new client record is started, and a green confirmation box will appear.

Add Authorization Information

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

Here you can see the Personal tab for additional information.

You can enter any non-required information (no asterisk) you'd like.

An address and phone number will need to be added. You can do so by clicking the three dots, shown here by the orange arrow.

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 ✕

* Required
Address Label
[Enter Address Label]

Address Line 1*   Address Line 2
[Enter Address Line 1]   [Enter Address Line 2]

Address Type*   Zipcode*
[Select Address Type ▼]   [___-__]

City*   County
[Enter City]   [Enter County]

State*   Main Phone Number*
[Select State ▼]   [(__)___-___]

☑ Active
☐ Use as billing address
☑ Use as main address
+ Add number
+ Add email address

CANCEL   **SAVE**

Enter the client's address. All required fields have an asterisk next to them.

Enter the required information, marked with an asterisk (*).

Address Type: To create a client in Sandata, entering an Address Type is required. Entering as "O-Other" means the address will not be overwritten in future file updates.

Main Phone Number: This is a required field; however, only a client's landline (or fixed Voice over Internet Protocol, VoIP, phone lines—for example, a phone line provided by a cable company) should be entered. If the client does not have a landline or VoIP line, enter 555-555-5555 or another clearly fake number.
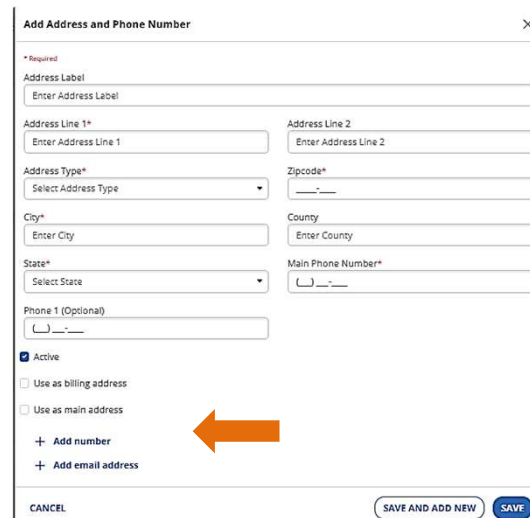
Click Save.

A reminder: Members should be encouraged to keep address information up to date with ForwardHealth. Clients can update their Medicaid information through the client's local income maintenance agency or tribe, online through the

client's ACCESS account, or by using the Medicaid Change Report (F-10137). Any address information added to the Sandata Portal will not update the Medicaid file or any other system.

Complete Personal Tab

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

Additional phone numbers can be added.
Enter client's landline home phone or VoIP phone number (such as a phone service provided through a cable company), if available. This should not be a client's cell phone number. The client's landline or fixed VoIP phone line captures the location the same way 911 does.

As you can see, there is no asterisk by the email; therefore, this is optional.

Complete Program Tab

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

Now click to the Program tab. Make note of the five separate areas here. We'll be filling in the information in this order:

1. Client status (showing here as "Pending" in the upper right corner). Change the Client Status from Pending to Active. "Active" status will allow you to edit more fields than would typically be allowed.

2. Program Details: The Effective Date is required. It auto fills to show the current date. The Effective Date is the date client status changes are made. The other field required is the Created Date. This can be a date in the past. It will set the standard for the other dates.

Be sure to click Save before going to the next box.

3. Service Details. Let's move to the next slide for this information.

Complete Program Tab: Service Details

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

Here is the Service Details box.

Click Add Service.

Select the Service from the drop-down list. Only eligible services will appear.
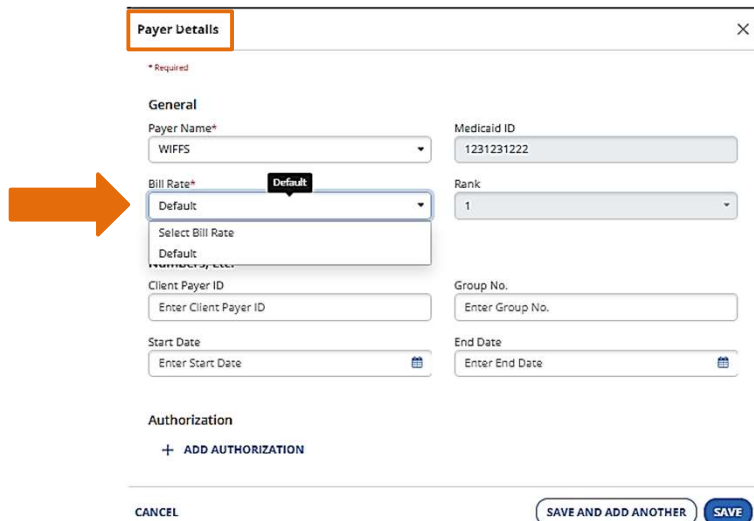
Add a Start Date. The "Start Date" cannot be earlier than the "Created Date" on the Program box that we just talked about.

A Start Date is required—it has an asterisk next to it. An End Date is optional on this screen.

Click Save.

Complete Program Tab: Payer Details

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

Now we move to the Payer Details box.

Select the payer from the drop-down list.

Click the drop-down arrow for the Bill Rate.
Select Default for the bill rate, which is the only choice.
All other information is optional.

Click Save.

Complete Program Tab: Authorization Details

Click **Add Authorization** to add authorization information.
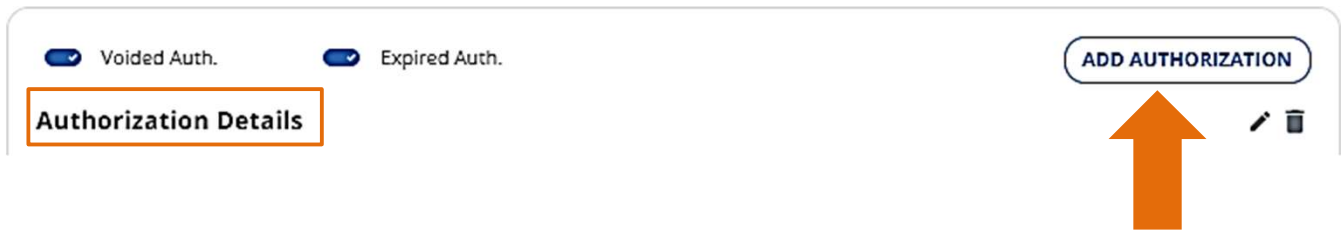
Note: This process will not create an actual Medicaid-approved PA. This is only providing required information to Sandata.

Finally, we look at the Authorization Details box.

Click Add Authorization. Remember, this is not creating a Medicaid-approved authorization. It's only providing the 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.**

The Authorization Details screen will open.

This is where you select from drop-down menus for the payer and service (the service code).

The "Event Code" can remain as "None."

Select the Format that best represents visit unit type.

Set the Start Date to cover the service start date. If you are backdating services, it should match the Created Date you used in the Program Details screen.

Set the End Date. Here, it is required. You can use any date up to 06/06/2079.

We've put a box around this end-date information on the slide. Setting that far-off end date will prevent you from needing to resubmit this information in the future, if the service code you're authorized to provide remains the same. If you set an earlier end date, you will need to complete this process again when you reach that end date. This far-off end date is acceptable here because this is not creating an actual Medicaid authorization,.

One additional note we would like to emphasize: The information you add here has **no** impact on the information your fellow nurses are adding to their own Sandata

portals. Your end date will not change another nurse's end date. Your Sandata portals are not connected. You are only adding information for yourself.

Add comments in the bottom box if you'd like, for your own reference.

Be sure to click Save.

Complete Program Tab: Authorization Details

The authorization information will start with "AMP" to show it was manually created.
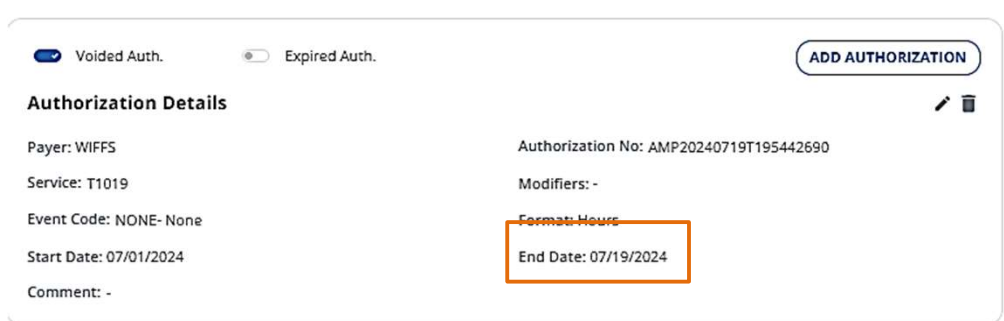
An authorization number will autofill. This will always start with "AMP" to show it was manually created in the Sandata system. This number will not match a Medicaid-approved authorization number. It exists in your business' Sandata EVV Portal account only.

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.

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

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**.

What if an authorization is received from **another** payer for that same service? The system will **not** automatically end date the manually created authorization information. In this case, when expecting a new authorization for that client from a different payer, the provider must end date the AMP authorization information.

To do so:
- Click the edit pencil.
- Change the end date.
- Click **Save**.

If both the AMP and the payer's authorization are active, the system won't be able to select the proper authorization during EVV visits. There would be unauthorized service exceptions to correct with each visit.

Apply Your Knowledge

True or False?

- Non-PAL independent nurses have no administrative role in EVV.

False

- Non-PAL independent nurses can end-date authorization information as 06/06/2079.

True

Let's pause here for an informal quiz:

Non-PAL independent nurses have no administrative role in EVV.
FALSE: As we've seen, all independent nurses will access the Sandata EVV Portal. Non-PALs will also enter required authorization information for their clients.

Non-PAL independent nurses can end-date authorization information as 06/06/2079.
TRUE: The information you enter is for your business only, for the purpose of adding the client to your Sandata EVV Portal. By setting the end date in the far future, you will not need to go through these steps again for that client (unless their service code changes). It is not a "real" Medicaid authorization. Only the PAL has the real Medicaid authorization.

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.

Please make note of these important items to do:

Make sure all the clients you're expecting to be in the Sandata EVV Portal are there. If a client is missing from the "active" client list, be sure to use the filter options to view clients with a status of "pending."
- For PALs: Allow three days for the authorization to arrive. If not there at that time, contact the payer first, and then EVV Customer Care if needed.
- For non-PALS: Required authorization information can be created in the Sandata EVV Portal.

Confirm that client addresses and any landline phone numbers are accurate in the Sandata EVV Portal. Clients should update their address and phone numbers through the usual methods. In the meantime, you can add valid addresses and landline phone numbers in Sandata. We'll see where to find how to do this in the next slide.

Curious for more?

Here's where you can find it.

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

Curious for more?

We've got it! Please go to our Training Administrators webpage and open the "Client data entry: Adding and editing clients" section. There, you'll find:

Modify Client Data training (PDF)
How to Change Client Status and Start of Care Date in the Sandata EVV Portal (video)
How to Add an Address and Phone Number in the Sandata EVV Portal (video)
Adding Required Authorization Information in the Sandata EVV Portal training (PDF)

The last item in this list is especially important for independent nurses who are not the PAL.

Checking In and Out
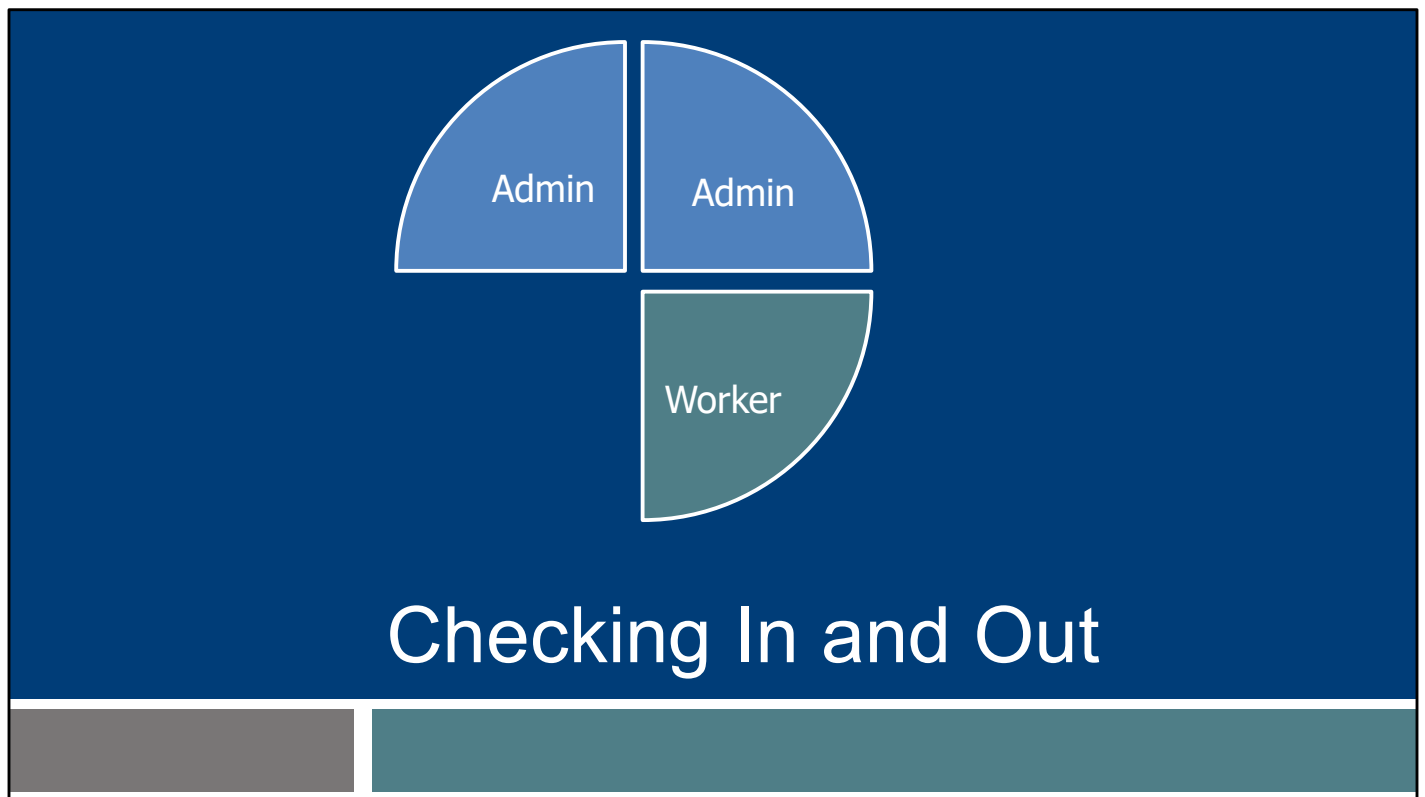
Let's briefly switch to your second role: Worker. This begins the more routine tasks of EVV.

Your Role as Worker

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

Let's watch a sample EVV visit. You are in the role of Provider Pat. She and client Sam show us a visit.

This three-minute video is on our DHS EVV homepage shown here.

https://youtu.be/rt29rXY_td8

Your Role as Worker

SMC App	Telephonic Visit Verification (TVV)	Fixed Visit Verification (FVV)
Cell phone or tablet	Landline at client's home	Device at client's home

From the video, you'll recall that Sandata has different methods that workers can use, interchangeably, to log their visit data. None of them require cell service or Wi-Fi at the point of care: (If you choose an alternate EVV system, not Sandata, the methods offered may be different, so be sure to ask.)

- The SMC app works on a cell phone or tablet. It can be used on Android or Apple products and works even if cell service or Wi-Fi is unavailable on site. GPS location is captured at check in and check out only. The app is Americans With Disabilities Act (ADA) and Health Insurance Portability and Accountability Act of 1996 (HIPAA) compliant. This is the most efficient and accurate method.
- The telephonic visit verification (TVV) method uses the client's home landline and uses the same method as 911 to obtain location. It can be a landline or fixed VoIP phone line—for example, a phone service provided by a cable company.
- The fixed visit verification (FVV) method uses a small device that is fixed or attached in the client's home. The FVV device is capturing the EVV visit; however, it doesn't report the EVV visit information. Once the worker has access to a phone, they'll need to call in the EVV information. This method is the last resort for EVV, because it is most cumbersome and is most prone to entry errors.

As a worker, you'll need training on the EVV method(s) you choose.

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:	2-
Worker Santrax ID:	
Sandata 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

43

There are a few numbers you need to know to capture EVV information during your visits. We've created a resource you can customize to document the numbers you'll need and keep them all in one place! This Worker Visit Card is found on the Training Workers webpage. It's also on the EVV Resources and FAQ webpage. We've put the link directly to it here, too, in the blue font.

If you prefer to create your own resource to keep your information handy (such as a note on your phone, or a different printed form), you can use the Worker Visit Card to identify some of the basic information that's useful to have.

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.
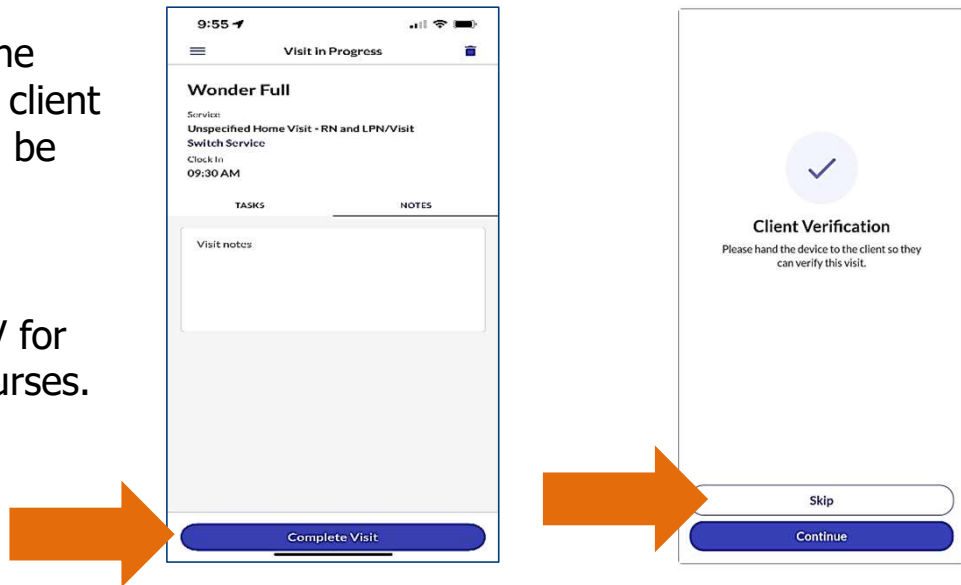
Independent nurses do not need to include the individual tasks done during the visit (like helping someone get dressed or helping them brush their teeth) and do not need to include the member's signature for the visit within EVV. These steps will appear within the Sandata system but can be skipped. Here we have screenshots of how that looks at the end of a visit on the SMC app.

As you end your visit on the app, go directly to "Complete Visit."
On the screen that requests client verification, select "Skip."

Apply Your Knowledge

True or False?

- Independent nurses need to check in and out using EVV.

True

- Independent nurses don't need to submit tasks and client signatures through EVV.

True

Let's pause here for an informal quiz:

Independent nurses need to check in and out using EVV.
TRUE: All the training items for workers will be just the same for independent nurses.

Independent nurses don't need to submit tasks and client signatures through EVV.
TRUE: These can be skipped on the app, TVV, or FVV.

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.

Please make note of these important items to do:

Review the EVV Training Workers webpage resources, as needed. If you need more information, our EVV Customer Care team is ready to help!

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

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

For more information on each of these methods, please visit our Training Workers webpage. There, you'll find videos and PowerPoints. The PowerPoints are available in English, Hmong, Spanish, and other languages as requested. You'll also find links to Sandata's training resources for workers. The Worker Visit card is available here in the "Getting started" section, too.

Do you like to learn by video or by reading? Will you use only the SMC app, or will you use a different method? Pick and choose—we have the options ready for you for each method. These are great references to pull up and review.

If you'd like some one-on-one assistance, please call our EVV Customer Care team. Their email and phone are in the dark blue box on each of our EVV webpages. They are here to support you!

Using Visit Maintenance
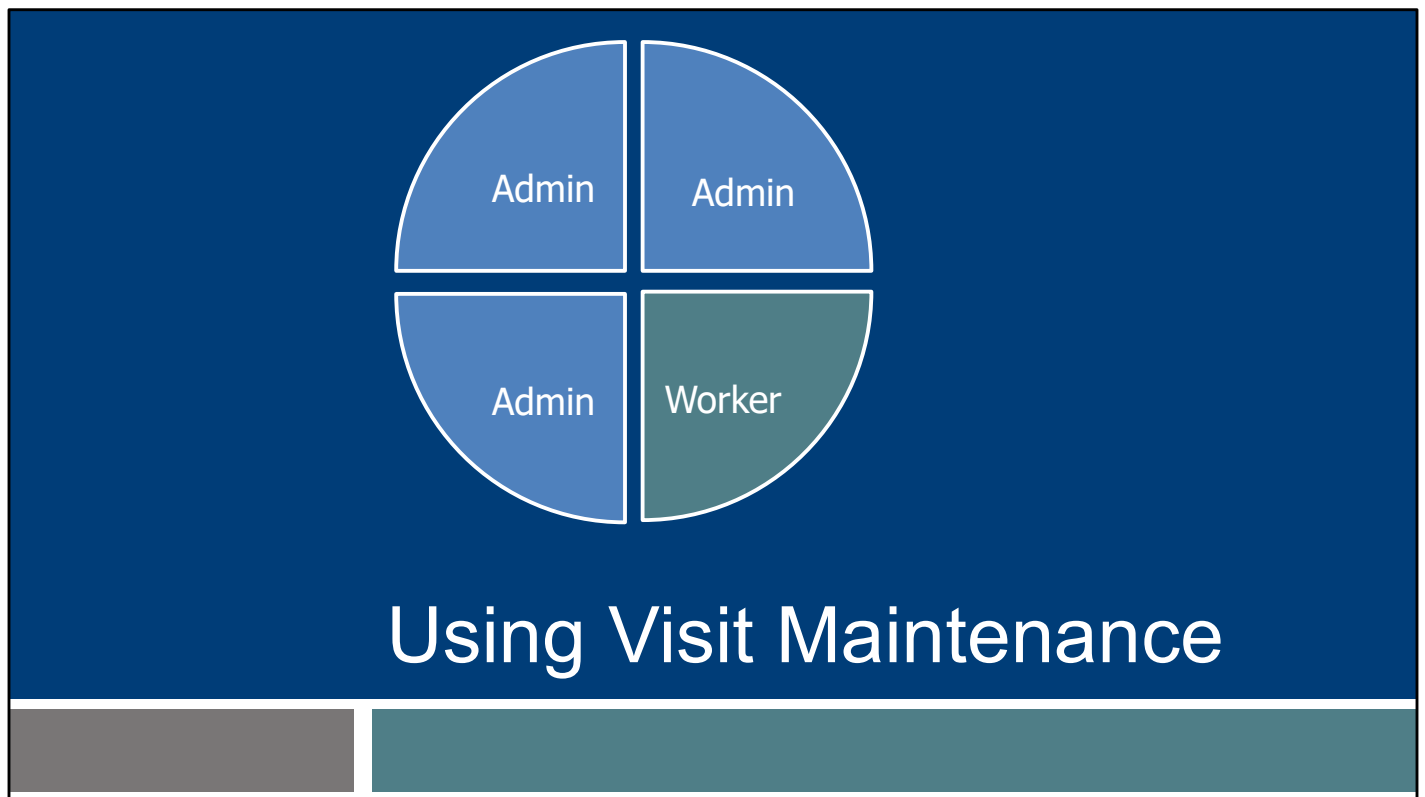
And now the final EVV piece, and the other routine EVV task: Using Visit Verification. This is in your administrator role.

Lifecycle Flyer
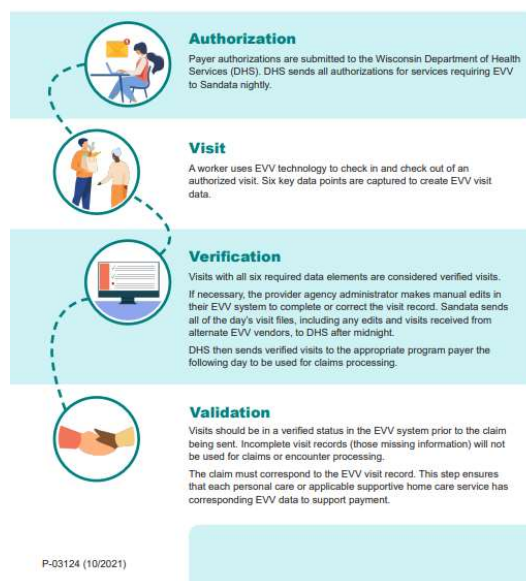
Make sure the EVV visit is in a "verified" status on the Sandata EVV portal before you send the claims.

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

As an administrator, it's helpful to see the big picture, beginning to end. Our EVV Lifecycle flyer answers the question, "How does EVV fit into the general claims process?" Be sure to save this flyer for future reference!

On this slide are the link and QR code that will take you to the EVV Lifecycle flyer. This flyer can also be found in the Resources section of the DHS EVV website. It's also on the Administrator Training webpage.

We've talked about the importance of client authorization information in the Sandata EVV Portal and the two ways that can happen.
We've also gone over visits and how you as a worker check in and out.

The next step is "Verification." Verify that all EVV information was captured accurately. This is done by **you**, as administrator, in the Sandata EVV Portal. You can do this daily, every other day, weekly—you decide. We'll go over some examples of this in the Sandata system in a bit. Only visits with complete visit information—those with a "verified" status—are sent to payers, including DHS as fee-for-service payer, daily. And only "verified" visits are used in the next step.

The last step is Validation. The payer confirms that the EVV data collected supports the claim detail. If there is no verified EVV visit, this step cannot happen, and the claim is not paid.
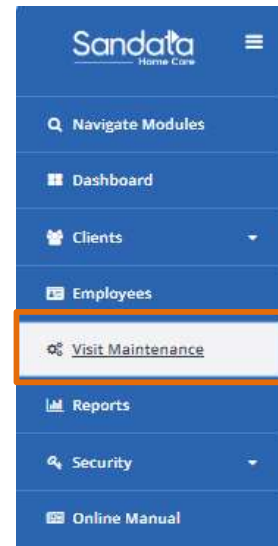
So think about the business routines you currently have. When do you usually submit claims now? How will you make sure that EVV verification process is done before you send the claims?

This flyer provides great background information. You can see how all the steps build on each other so the information can flow.

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.

Sandata
Home Care

≡

Q Navigate Modules

■ Dashboard

👥 Clients   ▾

▨ Employees

⚙ Visit Maintenance

📊 Reports

🔑 Security   ▾

▨ Online Manual

In the video, Provider Pat mentioned that if she makes a mistake or forgets, the administrator can make corrections. Independent nurses, that will be you! Let's briefly see how that happens in the Sandata system.

This is a screenshot of the Sandata EVV Portal dashboard. Visit Maintenance is the area in 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 outside EVV.

This is where you'll do the work of visit verification. Go to this area of the Sandata EVV portal by clicking the Visit Maintenance link.

Visit Maintenance

Click on Filters.
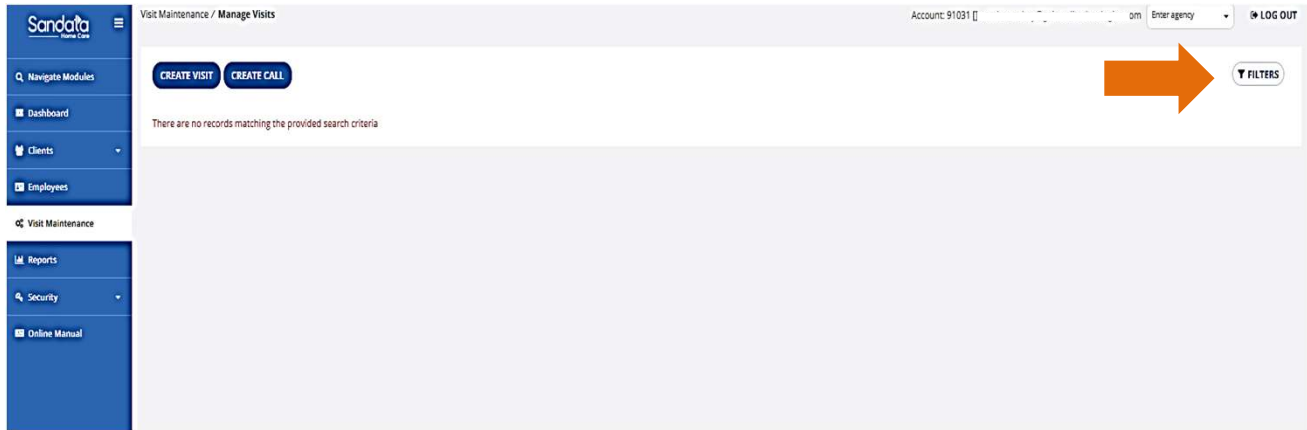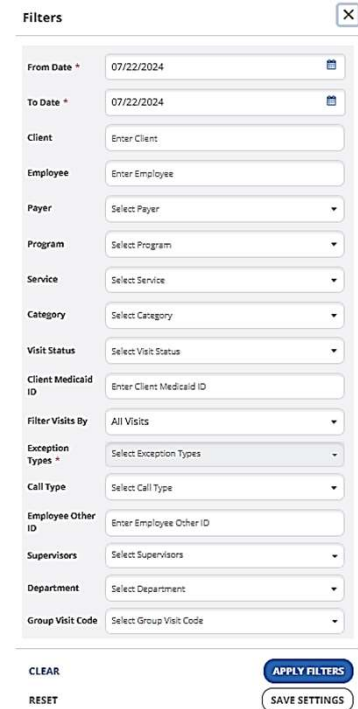
Click on Filters.

Visit Maintenance

- Add search criteria.
- Click Apply Filters.

From here, you'll have the opportunity to search for as many or as few visits as you'd like, back to the beginning of your Sandata EVV portal account. There are several search fields that can help you narrow down the search results.

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

Visit Verification

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

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

One filter choice is the "Filter Visits By" field.

Important tip: Always check to make sure this field shows what you want. By default, this filter is set to "All Exceptions." Filtering instead for "All Visits" is the only way to see visits that are in a verified status, as well as those that need correction.

Fix an Exception

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	C
CLAMMERTON, CLAMMY	S_____ni	Nursing Assessment or Eval/Visit	07/09/2024	10:49 AM	🔴	
Adams, John	Caregiver, Amber	Home Health Aide or CNA/Visit	07/03/2024			
🔴	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	0
Adams, John	B____ain	Personal Care/Day	06/12/2024 🟡	04:00 AM	06:00 AM	0
BILL____	B___ain	Unspecified Therapeutic Procedure - OT/Visit	06/12/2024 🟡	08:00 AM	10:00 AM	0
CLAMMERTON, CLAMMY	B___ain	Nursing Assessment or Eval/Visit	06/12/2024 🟡	02:00 AM	04:00 AM	0
(949)491-6758	🔴	🔴	06/12/2024	02:41 PM	🔴	
Adams, John	B___ain	Home Health Aide or CNA/Visit	06/11/2024 🟡	04:00 AM	06:00 AM	0
						T

Visits Without Out-Calls

If you filter visits by All Visits, you'll see visits that are successful and ones that need attention. This complete list also can be helpful for you to see if there are visits where you forgot to check in and out.

In this example, we see a lot of dots that show where information is missing, or corrections are needed. Each one of these dots is an "exception." When you hover your cursor over the exception, a message will describe it. This makes it easy to see what information needs correction.

This is from our test site, where we purposefully enter in errors—so don't worry: your list of visits will likely have fewer exceptions. It's possible you'll have a list without any exceptions at all—every visit in a verified status, no edits needed.

By selecting—clicking on—the dot, you will be taken to the visit details screen. There you can correct the information in that field. The next slide shows what that looks like.

Fix an Exception

Enter the missing call information.
Select a reason code and resolution code from the drop-down menus.
Click Add.

Here's an example of entering missing check-out information, the date and time.
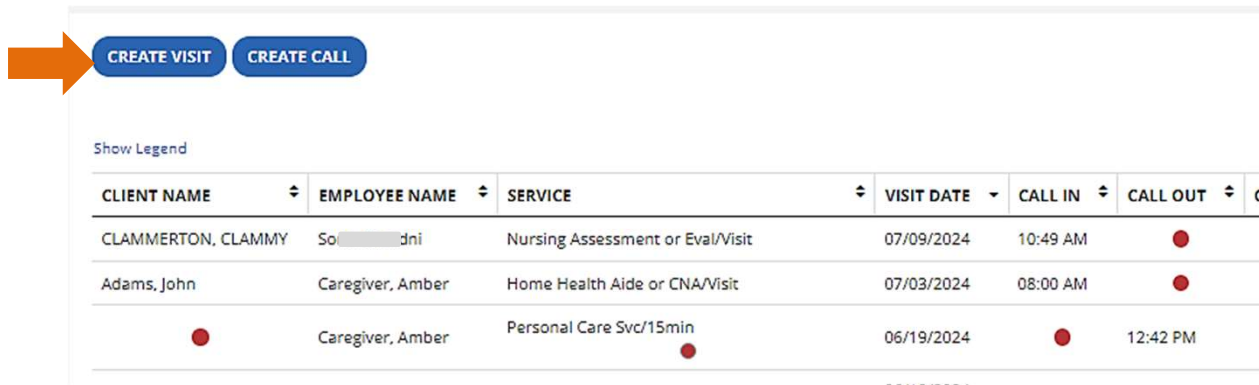
Every edit will require that you also select a reason code and resolution code from the drop-down menus at the bottom.

Click Add.

That's all there is to it: select the dot, and then correct the information. "Select and correct."

Create a Missing Visit

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

Did you forget to log an entire visit? You can create a "manual visit" by filling in all the information in the Sandata portal.

This isn't as efficient as Worker You collecting the information at the time of service, but it's available when you need it.

The Create Visit button will open a screen that leads you through all the information you need to manually enter an entire visit. It includes a check box to adjust the date for visits that are overnight.

Apply Your Knowledge

True or False?

- Exceptions show where information is needed.

  True

- Corrections can be made in the Sandata EVV portal, including adding an entire visit that was forgotten.

  True

Let's pause here for an informal quiz:

Exceptions show where information is needed.
TRUE: The exceptions show up with a dot. Select the exception dot and correct the information.

Corrections can be made in the Sandata EVV portal, including adding an entire visit that was forgotten.
TRUE: Making sure all visits are in a "verified" status—no errors or missing information--is important! If a visit has exceptions, the payer won't receive it for comparison to your claim.

Curious for more?

We've got it! Please see our Administrator Training webpage and open the "Visit maintenance" section. There, you'll find:

EVV Visit Maintenance PowerPoint: Administrative use of the Sandata EVV Portal
Refresher Training: Overview of Visit Maintenance video
Refresher Training: Visit Maintenance and Call Edits video
Refresher Training: Visit Maintenance and Clearing Exceptions video

Common EVV Questions

Let's take a look at some common questions independent nurses have had. If our previous slides were pieces of pie, this is the ice cream on top.

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.

This slide discusses the EVV system's rounding logic. Questions we've gotten in the past have included "What if I log in to my visit five minutes early?" or "What if I log out of my visit five minutes late?" This speaks to that.

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

In the example on this slide, more EVV units were captured than the shift that was billed for. The claim will pay for sufficient EVV hours captured.

We've also heard, what happens if my shift overlaps with another nurse's? That is okay. Check in when you start your visit, and check out when your visit ends. Later, when you submit your claim outside EVV, use the same practices you currently do.

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.

It can take up to two days for EVV information to transmit from Sandata to payers.

In fee for service, if you submit an invoice before EVV information arrives (remember, this can take one to two days), your fee-for-service claim will suspend for two days.
If EVV data is then found, the claim will pay.
If, after two days, no matching EVV information is found, the claim will deny. You should make any corrections needed to the EVV visit or the claim and resubmit the claim.

For an HMO or MCO claim, please contact your payer for their process.

A best practice: we recommend you make sure your EVV visits are verified in your Sandata EVV Portal before you submit your claims.

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.

Your fee-for-service Remittance Advice is a powerful tool to use. On it, you'll see information about whether a claim has paid or denied. If it has denied, an explanation of benefit (EOB) code will show. Here are the two EOB codes for EVV:

EOB message #1047, which states "Electronic Visit Verification system visit not found." That means the visit information is either not in a verified status or was not captured at all.
- Check the Sandata EVV portal.
- If there isn't a visit in the EVV system, go ahead and manually create the visit.
- If the visit is there, fix any exceptions.

Once the exceptions have been fixed or a manual visit has been created, the administrator should confirm that the visit is now in verified status. If yes, the claim should be resubmitted for payment.

EOB message #1048 means, "Electronic visit verification system units do not meet requirements of visit." In other words, the units in the EVV visit were less than the amount of units billed. Units should be equal to or greater than the amount of units billed.
- If the claim's billed units are wrong, fix the claim, and resubmit.
- If the EVV units are wrong, fix them in the Sandata EVV Portal, and confirm that the visit has a verified status. If yes, the claim should be resubmitted for payment.

You want to get paid. We want you to get paid, too!

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

While our EVV Customer Care team is the best resource for EVV questions, you may have questions that are specific to fee-for-service claims and billing.

You can access existing resources from the ForwardHealth Portal, shown here. There are brief information sheets that can be helpful.

If you'd rather talk through your claims and billing questions, ForwardHealth's Provider Services Call Center is available. In addition, ForwardHealth provider relations representatives are also able to offer help. Find the field rep assigned to your part of Wisconsin in the link provided.

Apply Your Knowledge

True or False?

- If a claim is denied, there's nothing that can be done.

False

- The EVV visit should show a length equal to or greater than what is on the claim.

True

Let's pause here for an informal quiz:

If a claim is denied, there's nothing that can be done.
FALSE. Use the explanation of benefit codes to understand the problem and fix it. You want to get paid—and we want you to get paid!

The EVV visit should show a length equal to or greater than what is on the claim.
TRUE: If an EVV visit is shorter, the claim will deny. If the EVV visit is longer or the same, it is fine.

Call to Action

Become familiar with your RAs and EOB codes.

Get answers to your questions.

Please make note of these important items to do:

Become familiar with your Remittance Advices and EOB codes. The information in them is there to help!

Get answers to your questions. Knowledge is power! There are many resources you can use.

Curious for more?
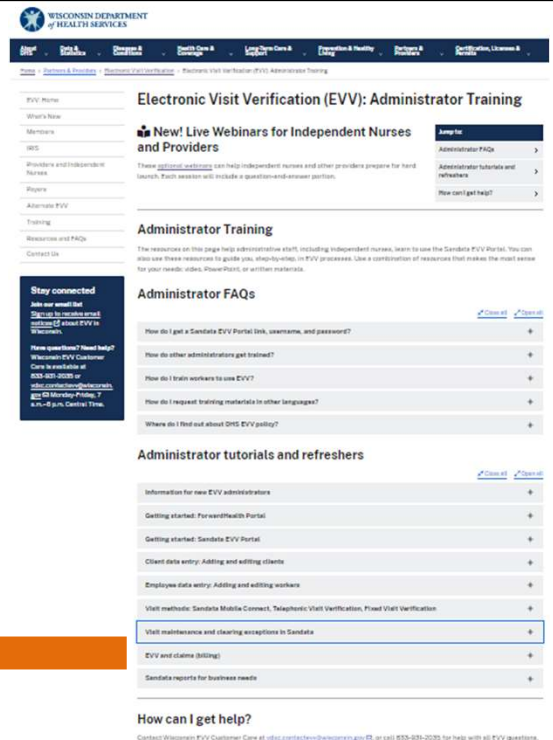
Here's where you can find it.

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

Curious for more?

We've got it! Please see our Training Administrators webpage and open the "Fee-for-service claims" section. There, you'll find:

Fee-for-Service EVV Administrator Training: Claim Edits, as a video or PowerPoint. Look for opportunities to participate in a Claim Edits webinar, too!

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.

We encourage you to adopt a few best practices:

- Confirm (PALs) or add (non-PALs) client authorizations in your EVV system in a timely manner. Make sure information in Sandata is complete and accurate.
- Review EVV visits in your EVV system 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.

As you begin EVV:

1. Be patient! Practice, practice, practice! You're learning something new, so expect it take time before it feels like routine.
2. Ask questions. If you're wondering about it, someone else probably is too. And sometimes your questions help DHS uncover an issue or even create a new solution we hadn't thought of before.
3. Reach out to Wisconsin EVV Customer Care about challenges with EVV that you may be having. They are here to help!
4. There are many resources on our EVV website. Take some time to familiarize yourself with the worker trainings and admin trainings.
5. And please speak up. Don't push off concerns. Elevate any concerns to our EVV Customer Care team so they can help.

This is a time for patience and learning. One step at a time—you can do it!

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 vdxc.contactevv@wisconsin. gov Monday-Friday, 7 a.m.– 6 p.m. Central Time.

Keep in touch! If you need advice, have questions, or have feedback:

•Watch your emails from Sandata and DHS.
•Contact Wisconsin EVV Customer Care with questions at 833-931-2035 or vdxc.contactevv@wisconsin.gov Monday-Friday, 7 a.m.-6 p.m. CT.
•Are you feeling especially uncertain? Arrange for office hours with EVV Customer Care. You will be assigned a knowledgeable representative who can meet with you once or meet with you weekly to make sure you are on track.

Thank You

Thank you for the important services you provide to members.

WISCONSIN DEPARTMENT *of* **HEALTH SERVICES**