# Supplemental Information to Sandata's Administrative Training Videos

August 2024

In this training we will be using these PowerPoint slides to help providers increase their understanding of how Sandata's EVV system works in Wisconsin, beyond Sandata administrator video trainings.

# Welcome

## Who is this training for?

Those who will have administrator roles, including independent nurses, *and* plan to use the Department of Health Services (DHS)-provided Sandata system

## Who are these NOT for?

- Providers using an alternate EVV system
- Those who do not have administrative roles, such as workers

First: We want to make sure you're in the right place:

This webinar is for those who have or will have administrator roles in EVV, including independent nurses, AND will be using the DHS-provided Sandata system.

If you are planning to use an alternate EVV system (not Sandata), this is not a training for your needs. We'll be covering information about the Sandata EVV system only. Please contact your alternate EVV vendor for details on their training.

If you will not have an administrative role, this is not a training for your needs. It will cover far more detail than what workers need in their role checking in and out for EVV visits.

Some of you may be just starting EVV. Some of you may have two years experience with it or more. Wherever you are today, we feel confident you'll leave with a better understanding of EVV in Wisconsin. Let's take a look at what we'll cover on the next slide.

# Objectives

When you leave today's webinar, you'll:

- Know where to find Wisconsin's EVV resources and training materials.
- Be familiar with unique features of the Sandata system in Wisconsin.
- Understand next steps for successful EVV use.

# Sandata Administrator Training

**Sandata offers its own online training videos and resources.**
- **Those trainings are not customized to include Wisconsin-specific information.**
- **This webinar and the Wisconsin EVV Supplemental Guide provide the Wisconsin-specific information.**

Before this session, you may have completed the administrator training and gained access to the Sandata EVV Portal.

- Some of you may have completed live webinar trainings in 2020 or early 2024 to gain access to the Sandata system. The information today will reinforce those live webinars.
- Some of you may have completed the Sandata online training videos instead. Those videos will provide you with a good basis for the Wisconsin information we'll go over today.

While Sandata offers its own online training videos and resources, those trainings are not customized to include Wisconsin-specific information. This webinar, and the written Wisconsin EVV Supplemental Guide, provides the Wisconsin-specific information.

Today's webinar will highlight the most important points for Wisconsin users.

# Today's Resource

Specific Wisconsin features are marked with a star.

Wisconsin EVV Supplemental Guide
www.dhs.wisconsin.gov/publications/p02745.pdf

**Wisconsin Electronic Visit Verification Supplemental Guide**

**Wisconsin-Provided EVV System Background**

The Wisconsin Department of Health Services (DHS) has chosen an electronic visit verification (EVV) system, offered through a vendor called Sandata, which may be used by all DHS programs, providers, and program payers. DHS provides the Sandata EVV system's data collection functionality free of charge to providers and program payers.

**What is this guide?**

This resource is for administrative staff who will need to use the Sandata EVV Portal. While Sandata offers its own online training videos and resources, **those trainings are not customized to include Wisconsin-specific information.** This guide provides the Wisconsin-specific information and should be reviewed alongside the Sandata trainings.

★ Look for this symbol for EVV features specific to Wisconsin throughout this guide.

**TIP:** To find specific content, hit the CTRL + F buttons on the keyboard at the same time. This will bring up a search box. Type in a word or phrase in the box and each mention will be highlighted.

**What if I have questions?**

- Visit the DHS EVV webpage at https://www.dhs.wisconsin.gov/evv/index.htm. The tabs on the left side of the page can help you navigate to information specific to members, IRIS (Include, Respect, I Self-Direct), providers, payers, alternate EVV, training, or resources and FAQs.
- As a reminder, training resources do not supersede DHS policy:
  - Fee-for-service providers should check the ForwardHealth Online Handbook for the most current, up-to-date policy.
  - Family Care and Family Care Partnership providers may refer to the Electronic Visit Verification topic (#22483) of the Online Handbook for policy questions.
  - IRIS participants, fiscal employer agencies, and IRIS consulting agencies should reference the IRIS Electronic Visit Verification Policy, P-03053 (02/2023), publication.
- Contact the program payer for payment and claims questions.

P-02745 (12/2023)          1          WISCONSIN DEPARTMENT of HEALTH SERVICES

We hope you're already familiar with the Wisconsin EVV Supplemental Guide. If not, that's okay. You can also follow along with it as we go through these slides today. The weblink here or the QR code shown here will take you to it. To use the QR code, open your cell phone camera and hover over the QR box. A text box will pop up on your cell phone screen. Tap on the text; it will open the webpage.

In the Wisconsin EVV Supplemental Guide, be sure to look for the blue-green star symbol for EVV features specific to Wisconsin. The star highlights the Wisconsin "cheese sauce"—information about Sandata's EVV system that are unique to Wisconsin.

The guide also includes more thorough explanations for some Sandata features.

Throughout this webinar we'll also show you where to find DHS-provided resources to guide you, step-by-step, in EVV processes. Wisconsin specific information is included in these resources. There are PowerPoints, videos, and written materials for you to choose from.

# Sandata EVV Portal Overview

# Common Terms

| DHS Terms | Sandata Terms |
| --- | --- |
| Worker | Employee |
| Member | Client |
| Participant | Client |
| Service authorization or prior authorization | Authorization |

First, let's work through the terms used in Wisconsin versus those in Sandata.

In the ForwardHealth Portal and other Wisconsin resources, you will see "worker" used. Sandata uses "employee."
Likewise, in Wisconsin we refer to "member" and "participant," and Sandata refers to "client."
Finally, a service authorization or prior authorization is simply "authorization" in Sandata.

# Wisconsin Navigation Modules

**These functions are included:**
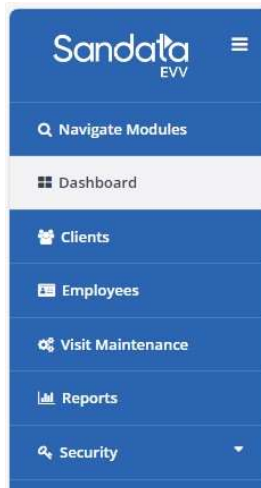


**These functions are NOT in the DHS-provided Sandata system:**
- Schedules
- Payroll
- Billing
- Claims

Wisconsin chose the least burdensome options to meet the federal EVV requirements. If you've logged on to the Sandata EVV Portal, the tool used by adminitrators, you'll recognize the screenshot on the left. Providers (including independent nurses) see these functions in the Wisconsin version of the Sandata EVV Portal:

- Clients
- Employees
- Visit Maintenance
- Reports
- Security

Please note these functions are not in the DHS-provided Sandata system:
- Schedules
- Payroll
- Billing
- Claims

You may see these referenced in Sandata's videos, but they are not included in Wisconsin. If you are interested in any of these features, there are EVV systems you can purchase that have them.

In Wisconsin, providers (including independent nurses) should continue using the scheduling, payroll, billing, and claims systems they always have, outside of EVV.

# Apply Your Knowledge



True or False?

- Claims and billing are included in the DHS-provided Sandata EVV system.

  False

- Worker schedules are included in the DHS-provided Sandata EVV system.

  False

Let's pause here for an informal quiz:

Claims and billing are included in the DHS-provided Sandata EVV system.
FALSE: In Wisconsin, providers (including independent nurses) should continue using the billing and claims systems they always have, outside of EVV.

Worker schedules are included in the DHS-provided Sandata EVV system.
FALSE: In Wisconsin, providers (including independent nurses) should continue using the scheduling systems they always have, outside of EVV.

# Curious for more?

## Here's where you can find it.

www.dhs.wisconsin.gov/evv/training-administrators.html

Curious for more?

We've got it! Please see our Training Administrators webpage. When you click on the "Information for new EVV administrators" section, you'll find these resources:

The middle item is the guide we're following today:
- Wisconsin EVV Supplemental Guide: Primary resource for navigating the Sandata EVV Portal based on Wisconsin's functionality

The last two will be especially helpful if you need to train workers in using EVV.
- Training Workers for EVV: Six steps for training workers on the Sandata EVV system
- EVV Successful Training: Trainer tips for leading successful training sessions

# System Set-up

Next, we'll go over Security and System Set-up. This covers how providers' (including independent nurse) information gets into the Sandata system, and who has access.

Some of you may have completed steps in this section already. For you, the "why" and "how" will build your understanding of EVV.

# Two Provider Paths

## 1. Medicaid enrolled

One of the federal requirements of EVV is to show who provides services—and that includes which provider agency. To make this happen, we needed a unique ID for each provider.

Some providers are Medicaid enrolled. These providers were already set up on the ForwardHealth Portal in Wisconsin, and had a Medicaid ID assigned to them. Personal care and home health care providers typically fall in this group. Independent nurses are also in this group. (All independent nurses who bill Medicaid are already Medicaid enrolled).

# Medicaid Enrolled Providers

The provider's business name, email listed in the ForwardHealth Portal, and the provider Medicaid ID (MA ID) is sent to Sandata. The MA ID is:
- Displayed on remittance advice
- 8 to 9 digits long

A provider's 10 digit National Provider Identifier (NPI) is **not** recognized in Sandata's system.

For these MA-enrolled providers, DHS sends the necessary information to Sandata. The information comes from the ForwardHealth Portal. It includes the provider's business name, email address, and MA ID.

Medicaid-enrolled providers (including independent nurses) should make sure their email information is accurate in the secure ForwardHealth Portal's "Demographic maintenance' section, in the "Mail to" section. Whatever email address is listed in that area of ForwardHealth is the one that Sandata will recognize and confirm.

The Medicaid ID is also sent to Sandata. Therefore, only the MA ID should be used to access Sandata's EVV trainings. The MA ID is found on a provider's (and independent nurse's) remittance advice. It is 8 or 9 digits long.

The 10-digit National Provider Identifier (NPI) will not be recognized in Sandata's system.

If you need help finding your MA ID, please contact EVV Customer Care for assistance.

# Two Provider Paths

### 1. Medicaid enrolled
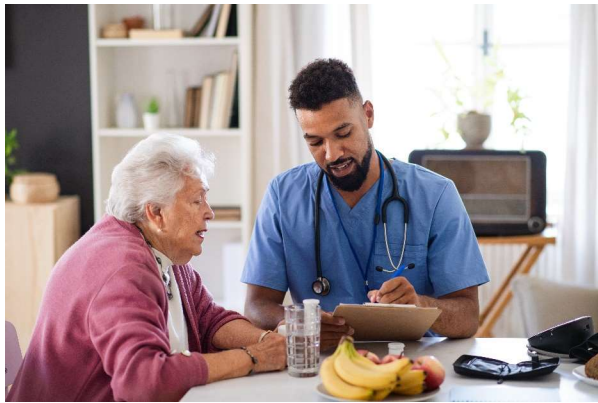
### 2. Non-Medicaid enrolled (supportive home care services)

And what about the second path? In addition to the typical Medicaid-enrolled providers, Wisconsin also has non-Medicaid enrolled providers who are required to use EVV. These providers supply supportive home care services.
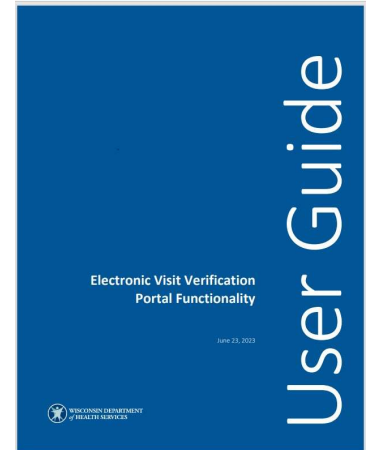
These providers did not have a unique identifier to use in ForwardHealth.

# Non-Medicaid Enrolled Providers

Non-Medicaid enrolled providers using EVV need to obtain an ID for EVV purposes.

How Non-Medicaid Providers Apply for an EVV Unique Provider ID on Vimeo

EVV Portal Functionality User Guide, P-02713

User Guide

Electronic Visit Verification
Portal Functionality

June 23, 2023

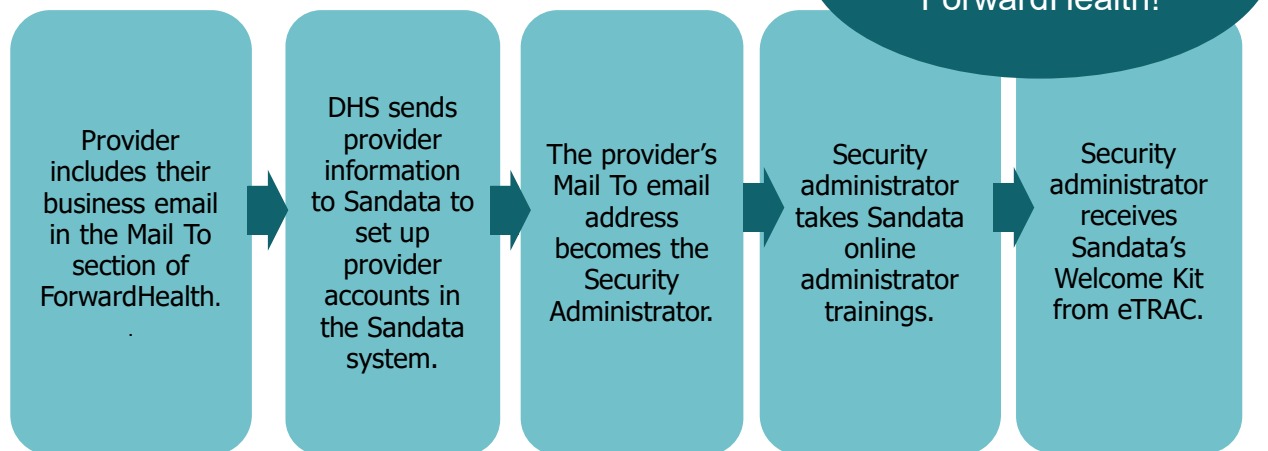WISCONSIN DEPARTMENT
of HEALTH SERVICES

DHS set up a way for these supportive health care providers to use the secure ForwardHealth Portal and obtain an ID. If this describes you as a provider, please allow two weeks for this process.

This ID from the ForwardHealth Portal will then be considered as a Medicaid ID *for EVV purposes only*.

DHS will send this unique ID to Sandata. DHS will also send the email address the provider entered into ForwardHealth to Sandata. These two pieces of information will be recognized in Sandata's system and used to confirm your business.

For non-Medicaid providers, there's a training video and written instructions in a user guide to lead you through the steps.

# EVV System Set-up

**Be sure to confirm the email on file in ForwardHealth!**

| Provider includes their business email in the Mail To section of ForwardHealth. | DHS sends provider information to Sandata to set up provider accounts in the Sandata system. | The provider's Mail To email address becomes the Security Administrator. | Security administrator takes Sandata online administrator trainings. | Security administrator receives Sandata's Welcome Kit from eTRAC. |

No matter which type of provider you are, necessary information for all providers (including independent nurses) is sent to Sandata's system, using the ID.

Please note all the ways in which the email address for the provider in the Mail To Address field on the secure ForwardHealth is also used in these steps:

- DHS sends provider information, including the provider ID and email, from the ForwardHealth Portal to the Sandata EVV Portal. Sandata uses the information to set up provider accounts in the Sandata system.
- The provider's email contact is automatically assigned the role of security administrator for the Sandata EVV Portal.
- This security administrator must attend training through either DHS-provided live webinars, when available, or Sandata's adminstator training videos. The provider ID, as well as the email from ForwardHealth, is used to register for trainings.
- After the security administrator completes training, Sandata (through eTRAC) will send a Welcome Kit to the provider's email. The Welcome Kit includes credentials from Sandata for logging in to the Sandata EVV Portal, a new Sandata provider ID number, and resources to share with workers.

You can see the importance of the provider email address in ForwardHealth and how it

helps set up your Sandata account.  Be sure to confirm the email on file in ForwardHealth!

After your Sandata account is established, other information can flow into that account, as we'll see later.

# EVV System Set-up

Make sure your business information is up to date.

Be sure to confirm the email and name on file in ForwardHealth!

Introduction » **Mailing Address** » Tax Information and Submit

**Mailing Address**

Required fields are indicated with an asterisk (*).

Email Address - Enter the email address of the person who should receive the emails related to the EVV Welcome Packet and Credentialing.

Attention Line* ATTENTION LINE TEST
Address Line 1* ADDRESS 1 TEST
Address Line 2 ADDRESS 2 TEST
City* CITY TEST
State/ZIP* WI 53001 - 4321
Phone* (915)444-3333

Email Address* test@mail.com

Previous    Next    Exit

Here's a screenshot of the ForwardHealth area that provides the email address to Sandata.

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. Make sure an accurate email address is entered. It's also helpful to have a person's name in the "Attention" line at the top.

# EVV System Set-up

| | |
|---|---|
| If administrative training is completed using Sandata's video training... | ... the Welcome Kit is sent within two days. |

We've mentioned that Sandata sends a Welcome Kit to the email listed. Let's dive into those emailed Welcome Kits a bit more. The Welcome Kit is sent once to each provider (including independent nurses). When the security administrator's training from Sandata is completed, the Welcome Kit will be sent within two days.

The Welcome Kit will be sent to the email address listed in the ForwardHealth Portal's "Mail to" address field. Check your spam filters. If there is a delay, call EVV Customer Care. They can arrange for the Welcome Kit to be re-sent.

# EVV System Set-up

## Automated Sandata email: Training done

Congratulations, Test Tester!

You have completed the entire curriculum:
**Wisconsin DHS - Electronic Visit Verification (EVV) Administrator Training**

Here are the next steps for providers and fiscal employer agencies:

- Review the Wisconsin EVV Supplemental Guide for information on Wisconsin-specific changes to the Sandata system.
- Expect an email from Sandata's eTrac system with subject line, "eTrac – Welcome Kit Email." Be sure to check your spam folder as well. The email will go to the address listed in the ForwardHealth Portal.
- Use the link in the eTrac email and confirm your Medicaid ID number. You will be forwarded to a page of documents to individually upload, save, and use:
  - WI Welcome Letter: Contains the provider-specific Provider ID, first-time login information to the Sandata EVV Portal, and other provider-specific information for setting up the Sandata EVV Portal.
  - WI Service and Task Lists: Lists service codes (required) and task IDs (provider's option to require) for employees to use for any visit with EVV.
  - Three WI EVV Call Reference Guides:
    - WI TVV Call Reference Guide: Basic call reference guide for workers to use with telephonic visit verification (TVV) that includes the toll-free phone number

## Sandata eTRAC email: Welcome Kit

**Sandata**

Dear Provider:

Welcome to the Wisconsin Department of Health Services (DHS) Electronic Visit Verification (EVV) Program provided by Sandata Technologies. You can now set up administrative users for your Sandata EVV system by following these quick steps:

- **Access the Sandata EVV Login page:** https://evv.sandata.com/VM/Login.

  **Quick Tip:** To quickly access your EVV system every time, bookmark this webpage. Here are instructions on how to do it for different browsers:
  Mozilla Firefox
  Google Chrome
  Microsoft Edge

- **Enter your administrative credentials:**
  - Agency:               STX «####»
  - Username:            «Username»
  - Temporary Password:  «EVV Account Password»

19

---

On the left is a sample of the email providers will receive after they've completed the initial Sandata training. We've made sure it has a handy list of next steps and links for you.

On the right is a sample of the Welcome Kit letter we've already mentioned.

The Welcome Kit has links that provide access to the Sandata EVV Portal and a temporary password.
Using the temporary password provided, log in to the portal as an administrator and reset the password.

Note: The temporary password will expire after 60 days.

The Welcome Kit will also have a link to these documents:

TVV Call Reference Guide
Group Visit Call Reference Guide
FVV Call Reference Guide

The Call Reference Guides are the step-by-step call scripts for workers using telephonic visit verification (TVV) or fixed visit verification (FVV) for their visits. They will have the agency ID pre-printed on them, as well as the toll-free phone number assigned to you for TVV and FVV calls. Download these to your work computer where you can find them again. The link provides a one-time access to them. You'll want to print these out for workers who will need them. If you've misplaced these files, let EVV Customer Care know. They can help get duplicates sent to you.

The other two documents in the Welcome Kit that you can save and print as needed:

Service List: This is the service code information workers will need to enter when they complete visits using EVV.
Task List: Task code information workers will need to enter when they complete personal care (T1019) visits, *if required to enter tasks for record of care within EVV.*
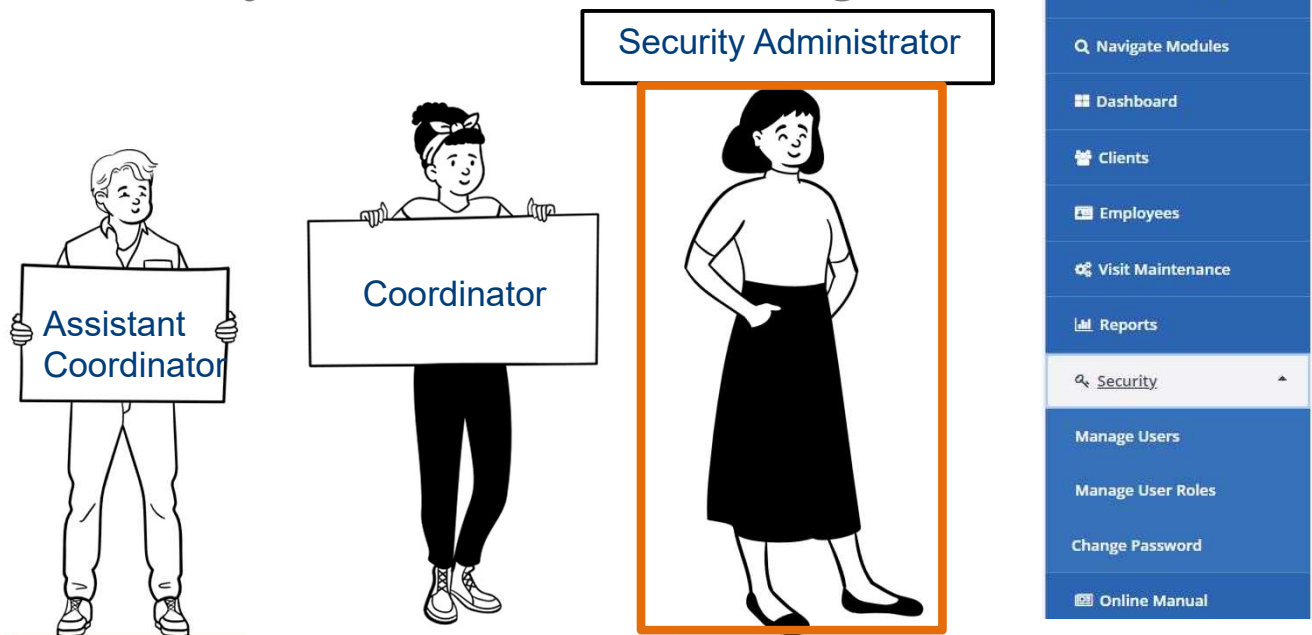
Let's move on to the administrative Sandata EVV Portal that is waiting for you. Let's look at security within Sandata's EVV Portal. Each provider (including independent nurses) controls who has access to this portal, and what that administrative user is allowed to do there.

There are three user roles for the DHS-provided Sandata system. These are set up the same way for all Wisconsin users. What a role can do builds as you go across this list. Take a look and consider your office setting, and how you'd like to assign duties.

- Assistant Coordinator:  This role supports the provider. For example, the Assistant Coordinator can do very basic visit edits..
- Coordinator:  The coordinator role is for general administrative staff who are responsible for the day-to-day activities of the provider's business. The Coordinator role will have Assistant Coordinator privileges plus a few more.
- Security Administrator: This is the primary security role for the Sandata EVV system. The Security Admin role has access to all privileges.

Why is this important? If someone on your team isn't able to access areas of the Sandata EVV Portal that they need, check the role they've been assigned. They may need an upgrade in their assigned role. Or if a team member is going on vacation—be sure there's backup in the roles. Likewise, if someone leaves employment or for other reasons doesn't need access to the Sandata EVV Portal, you'll need to remove them. "Manage users," seen just below "Security" on this screenshot, is where that is done.

The only role that is required, of course, is the security administrator. Sandata will automatically assign this to the email address that was listed in the ForwardHealth Portal. Independent nurses, this will be automatically assigned to you. The security administrator can re-assign the role later if needed.

For a full list of specific permissions granted to each of these roles, please see the Wisconsin Supplemental Guide.

# Apply Your Knowledge



True or False?

- It's important for providers to confirm the email that's on file for them in ForwardHealth.

  True

- All providers, including independent nurses, will need a security administrator in their Sandata EVV Portal.

  True

Let's pause here for an informal quiz:

It's important to confirm the provider email that's on file in ForwardHealth.
TRUE: The email listed for the provider in ForwardHealth is what is sent to Sandata. It's also where DHS will send important emails about policy and training.

All providers, including independent nurses, will need a security administrator in their Sandata EVV Portal.
TRUE:  By default, this will be the owner of the email address that's on file in ForwardHealth. The role can be reassigned by that person to someone else later.

# Call to Action

Confirm the provider email address shown in the ForwardHealth Portal for your business.

Decide who needs to access the Sandata EVV Portal, and what role they should have.

Please make note of these important items to do:

Confirm the provider email address shown in the ForwardHealth Portal for your business. Remember, this is the only administrative email address DHS sends Sandata.

Decide who needs to access the Sandata EVV Portal, and what role they should have.

Curious for more?

We've got it! please see our Administrator training Webpage.

The "Getting Started: ForwardHealth Portal," and "Getting Started: Sandata EVV Portal" sections are a great resource!
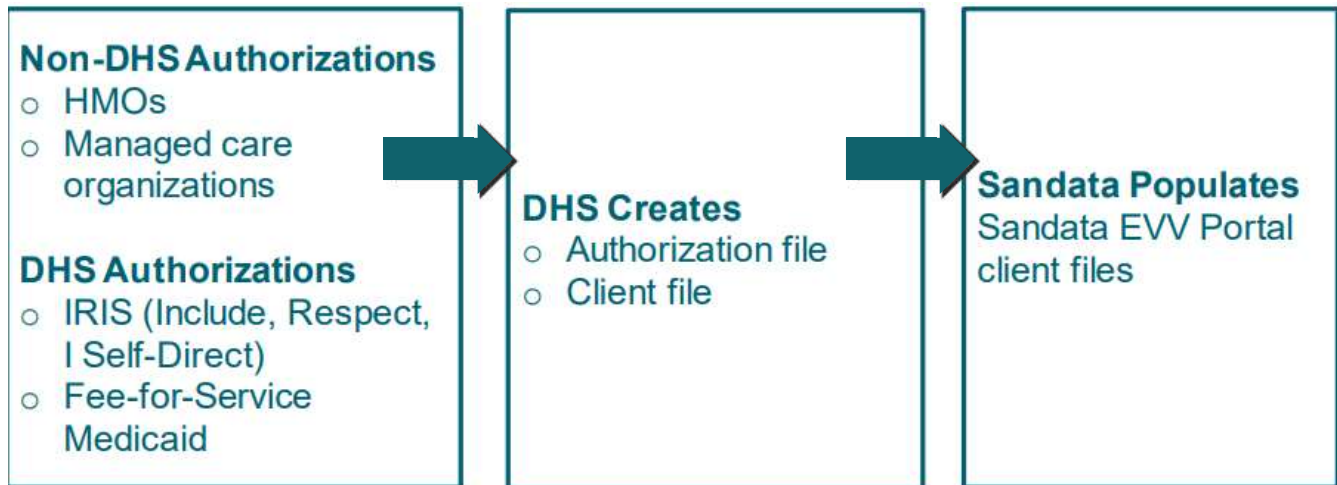
For non-Medicaid providers, the ForwardHealth section has a user guide for ForwardHealth as well as a video. These resources walk the non-Medicaid providers (supportive care providers) through the steps of getting an ID for EVV purposes.

The Sandata section has PowerPoints about Sandata's system and the security functions.

# Client Information

# Client Information

## Client information moves from DHS to Sandata

**Non-DHS Authorizations**
○ HMOs
○ Managed care organizations

**DHS Authorizations**
○ IRIS (Include, Respect, I Self-Direct)
○ Fee-for-Service Medicaid

**DHS Creates**
○ Authorization file
○ Client file

**Sandata Populates**
Sandata EVV Portal client files

Where does client information come from, and how does it get to a provider's Sandata EVV Portal?

Here's what happens each night:.

- DHS receives authorizations from HMOs and Managed Care Organizations (MCOs). These, in addition to IRIS and fee-for-service authorizations that start at DHS, are sent as authorization and client files to Sandata nightly.
- DHS only sends authorization and client files that show EVV is needed. Non-EVV services are not included in the Sandata EVV Portal. Sandata does not receive more information than required, in compliance with privacy laws (HIPAA).
- Sandata receives and populates the client information in the Sandata EVV Portal. There are some important exceptions we will talk about in a few slides.

Both authorization and client files are sent to Sandata nightly.

Here are some common questions about this process:

**How long does an approved authorization take to get from an HMO or MCO to Sandata?**
One day to go to DHS, and a second day to go to Sandata. If an expected authorization doesn't populate a provider's Sandata EVV Portal in three days, contact EVV Customer Care.

**What about clients whose service is allowed by policy without an authorization?** That

client's information may not be automatically sent to the Sandata system. We'll have more about that scenario in a few slides.

**What about independent nurses who are not the prior authorization liaison (PAL)?** Only the liaison receives the prior authorization to their Sandata account. We'll have more about what non-PALS do in a few slides.

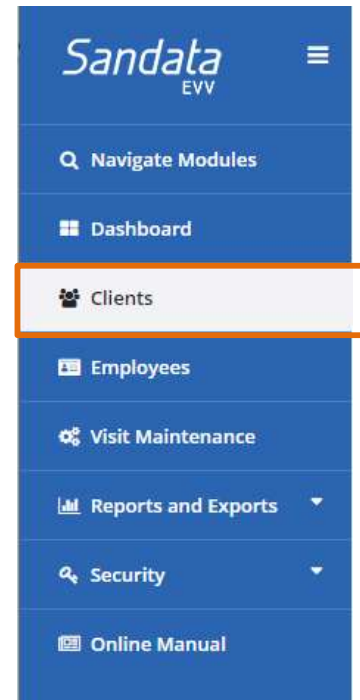**Will information I add about a client in the Sandata EVV Portal flow back to other systems?** No. It is important to understand that information from DHS only flows one way, to Sandata. This information will only update the Sandata EVV Portal. For example, adding a new address for a client in the Sandata EVV Portal will not send that new address back to DHS or update any Medicaid systems. The usual methods for updating other systems are still in place.

# Client Information

Clients arrive in the Sandata EVV Portal with a "Pending" status. This does not prevent workers from checking in and out for EVV visits.

Changing clients to an "Active" status:
- Helps providers confirm new clients in Sandata.
- Ensures the client is included on reports.
- Allows some edits to client information.

Sandata EVV

- Navigate Modules
- Dashboard
- Clients
- Employees
- Visit Maintenance
- Reports and Exports
- Security
- Online Manual

27

---

Clients arrive in the Sandata EVV Portal with a status of "Pending."

The pending status does not need to be changed. Clients listed in a pending status will not prevent the worker from checking in and out for EVV visits.

However, changing the client status from "pending" to "active" has some advantages:

- It can help providers confirm a new client's file arrived in the Sandata system as expected.
- It also ensures the client is included on any reports that you want to use in Sandata's system. Many reports only pull up "Active" clients. "Pending" clients are not included.
- Finally, it allows some edits to client information. We'll take a look at those in a few slides.

A best practice is to change clients to "Active" status. We'll direct you to resources that show how to change a client's status at the end of this section.

# Client Information

A client's Sandata ID can be found in these places:

**Client's Personal tab**

Clients / **Edit Client**

< BACK  **CAREWI, NineNineSixZeroZero**   WIHMO- WI HMO | Pen

Client ID: 101512 | Medicaid ID: 2334444222 | Main Address: 7122 N 76th St | Phone No: -- | Ma

**Personal**   Program

**Identifiers**

Client ID    101512          Medicaid ID    2334444222

SSN    -                      Agency ID      2334444222

**Active Client report**

| CLIENT ID ⇕ | CLIENT MEDICAID ID | CLIENT NAME ⇕ |
|---|---|---|
| 101512 | 2334444222 | CAREWI, NineNineSixZ |
| 106550 | 2334444269 | ANTBCBS, NineNineFiv |
| 109772 | 9911347699 | MRBThree, Test |

28

In the Sandata EVV Portal, each client is assigned a six-digit Sandata Client ID.

Workers will need the Sandata client ID to check in and out of visits. Be sure to share this information with your workers. This will reduce errors and save administrators' time in making corrections later.

Where do you find it? You can easily find the client's Sandata Client ID in these places within the Sandata EVV Portal:

- The Client's Personal tab: This is useful if you only need one client's information. This is accessed from the "Client" tab in the Sandata EVV Portal.

- The "Active Client" report: This is useful if you need many clients' information. This is accessed from the "Report" tab in the Sandata EVV Portal.

# Client Information

Edits that can be made for all clients in Sandata:
- Change a client's status to "Active" or "Inactive"
- Change a client's Start of Care date
- Enter an additional address
- Enter a landline or fixed Voice over Internet Protocol (VoIP) phone number

For client address and phone number changes outside Sandata, please see the EVV FAQ webpage:
www.dhs.wisconsin.gov/evv/faq.htm

Some edits to client information can be made in the Sandata EVV Portal. These edits will not update any other systems outside the Sandata EVV Portal. You can:

- Change client status to "Active," "Inactive," or "Pending"

- Change the Start of Care date

- Enter a valid and verifiable address

- Enter a valid and verifiable phone number—either a landline or a fixed Voice over Internet Protocol (VoIP) phone (for example, a phone line provided by a cable company)

**TIP:** As usual, clients are responsible for updating their information. Primary address information for a client must be updated by the client using the usual resources. Our EVV FAQ webpage has helpful directions and links for phone and address changes that can be done:

- Through a client's local income maintenance agency or tribe

- On the ACCESS website by using the Information Change Report

- If your client receives SSI MA or is dual-eligible for both Medicare and Medicaid,

address changes need to process through the Social Security Administration by updating the address listed in the SSI Record field (A Social Security Administration address changes may take a few weeks to process completely.)

Is a client's address causing issues on live-in worker forms? Call EVV Customer Care and ask to escalate unresolved address matching issues for live-in workers.

# Adding Required Authorization Information

In Wisconsin, certain services are allowed by policy without an authorization:

- Fee-for-service clients who receive under 50 hours of T1019 services
- Home health care codes that need to start before an authorization has been issued
- Home health care codes that will not require an authorization because fewer than 30 visits in a calendar year
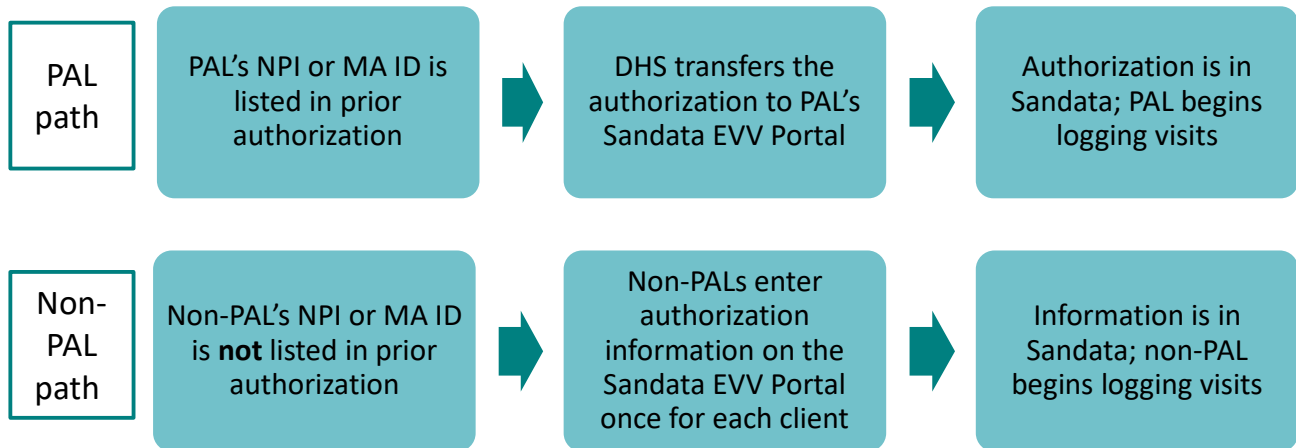- Private duty nurses who are not the prior authorization liaison (PAL)

We've mentioned that some clients' files will not be sent to Sandata.

In Wisconsin, certain services are allowed by policy without an authorization. Other prior authorizations, such as private duty nursing authorizations, are missing important information the Sandata system needs. In these situations, the required authorization information should be created by the provider in the Sandata EVV Portal:

- Fee-for-service clients who receive under 50 hours of T1019 personal care services in the calendar year
- Home health care service codes that need to start before an authorization has been issued
- Home health care service codes that will not require an authorization because fewer than 30 visits will be performed in a calendar year
- Private duty nurses who are not the prior authorization liaison (PAL).

Adding the required authorization information in these situations means the client's information will then be in the Sandata EVV Portal. It also means workers can check in and out of visits using EVV.

# Prior Authorization Liaisons (PALs) and EVV Authorization Information

| PAL path | PAL's NPI or MA ID is listed in prior authorization | → | 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 MA ID is **not** listed in prior authorization | → | Non-PALs enter authorization information on the Sandata EVV Portal once for each client | → | Information is in Sandata; non-PAL begins logging visits |

Here we have a bit more information for the independent nurses who provide private duty nursing services.

Though our private duty nurse service codes (99504, S9123, and S9124) always require a prior authorization with ForwardHealth, the authorization field that feeds into the Sandata EVV Portal only includes the PAL's MA ID or NPI. We see this series of steps on the top line of this slide. The Non-PAL's path is listed on the line below. Non-PALs will need to add authorization information into the Sandata EVV Portal.

We'll direct you to resources that show how to add authorization information at the end of this section.

# Adding Required Authorization Information

**Use this resource from the Wisconsin EVV Supplemental Guide:**

**Appendix A—Payer List**

The following table is a list of payers and the abbreviations used for them on the Sandata EVV Portal (Updated 11/2023).

| Sandata Payer Wisconsin DHS Program Payer ID | Sandata Program Name Wisconsin DHS Delivery System | Delivery System | Program Payer Name |
| --- | --- | --- | --- |
| WIFFS | Fee-for-service | Fee-for-service | Wisconsin Fee-for-Service |
| ANTBCBS | WIHMO | HMO | Anthem Blue Cross and Blue Shield |
| CAREWI | WIHMO | HMO | Care Wisconsin Health Plan, Inc. |
| CCOMMHP | WIHMO | HMO | Children's Community Health Plan, Inc. |
| DEANHP | WIHMO | HMO | Dean Health Plan |
| GHCEC | WIHMO | HMO | Group Health Cooperative of Eau Claire |

If you need to add required authorization information into the Sandata EVV Portal, you'll need to enter the name of the payer and program. In the portal, an abbreviated version of each payer's name and the program will show.

If you need the list of these payer names, this chart is helpful. It is located in the appendix of the Wisconsin EVV Supplemental Guide. It lists all payers in alphabetical order and which delivery system (program) they are part of.

This is also helpful when you are looking at exceptions in Visit Maintenance and need to be sure the correct payer is on file. (We'll talk more about Visit Maintenance and exceptions later.)

# What Sandata does NOT include in Wisconsin

- Client schedules
- Client invoices
- Deleting a client
- Changes to a Medicaid authorization

You may have heard these referenced on the Sandata videos, but a reminder that these are not included in Wisconsin's Sandata system:

- Client schedules are not included in the DHS-provided Sandata EVV system. Therefore, when a visit starts or ends isn't compared to an expected time. It's not marked "late to shift" or "left early." EVV does give the provider information about the time in and out if they'd like to follow up.
- Client invoices. Providers should continue their current processes for invoicing and billing.
- Deleting a client. A client's status can be changed to inactive, but not deleted.

Finally:
- Changes to a Medicaid authorization. Changes to a Medicaid-approved authorization, such as a change to services, need to be made through the usual authorization process. While a client's authorization information can be entered to the Sandata EVV Portal, doing so doesn't create a Medicaid-approved authorization.

# Apply Your Knowledge

True or False?

- When a client's Medicaid authorization is approved, it will show up instantly in the Sandata EVV Portal.

  False

- Authorizations for all services will appear in the Sandata EVV Portal.

  False

Let's pause here for an informal quiz:

When a client's Medicaid authorization is approved, it will show up instantly in the Sandata EVV Portal.
FALSE: It may take a few days. If a client doesn't show in your Sandata EVV Portal by the third day, first contact the payer to ask about the authorization's status. If further assistance is needed, call EVV Customer Care.

Authorizations for all services will appear in the Sandata EVV Portal.
FALSE: Only authorizations for services that require EVV will be sent to Sandata. Also remember that if a provider (including independent nurses) provide a service but doesn't typically have an authorization specifically assigned to them, such as non-PAL nurses, the provider should enter the authorization information into the Sandata EVV Portal.

# Call to Action

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

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

Please make note of these important items to do:

Confirm 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 the correct information in Sandata.

Make sure all 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 services that require a Medicaid authorization: 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 services that do not have an authorization sent to the provider (including non-PAL nurses): Required authorization information can be created by the provider in the Sandata EVV Portal.

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

Curious for more?

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

Sandata EVV Portal: Modify Client Data PowerPoint: Managing client information on the Sandata EVV Portal, including a client's status and adding valid and verifiable client phone and address information

How to change client status and start of care date in the Sandata EVV Portal video: How to change a client's status (pending, active, inactive), their start of care date, and their end of care date in the Sandata EVV Portal (4:37 minutes)

How to add an address and phone number in the Sandata EVV Portal video: How to add a valid and verifiable address or phone number in the Sandata EVV Portal (4:03 minutes)

Adding required authorization information in the Sandata EVV Portal PowerPoint: Administrator's steps in the Sandata EVV Portal for adding authorization information

# Employee (Worker) Information

Let's move on to the Employee (Worker) information. This is another area that has very Wisconsin-specific features.

In Wisconsin, we typically use the term "worker." Sandata uses "employee." In this section, we'll use the term that matches the screens—ForwardHealth or Sandata—that are being used.

# Adding New Employees
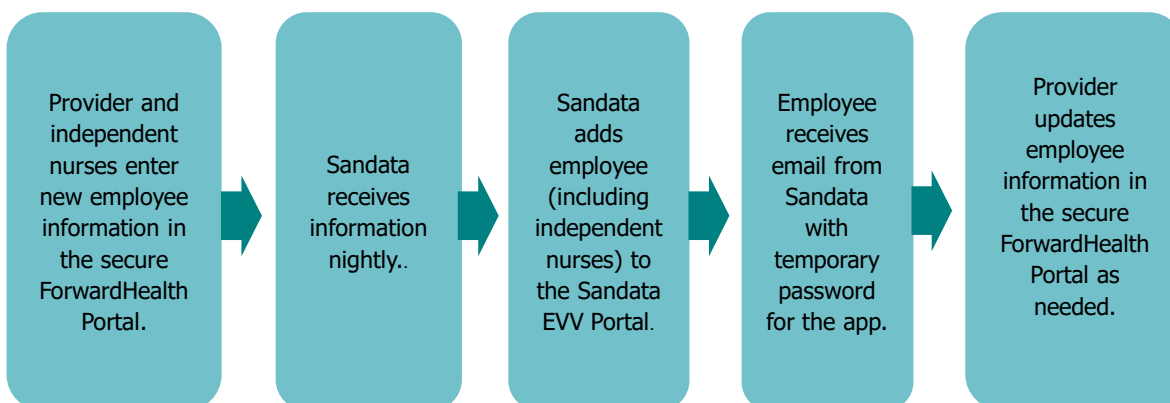
| Provider and independent nurses enter new employee information in the secure ForwardHealth Portal. | → | Sandata receives information nightly.. | → | Sandata adds employee (including independent nurses) to the Sandata EVV Portal. | → | Employee receives email from Sandata with temporary password for the app. | → | Provider updates employee information in the secure ForwardHealth Portal as needed. |

**TIP:** DHS recommends adding ForwardHealth Portal employee maintenance to the provider's human resource on- and off-boarding processes.

---

In Wisconsin, new employees are added through the secure ForwardHealth Portal only. Here's the big overview:

- Providers and independent nurses enter employee data in the secure Forward Health Portal. (Independent nurses, you will have one employee: yourself.) The secure ForwardHealth Portal will create a unique employee ID (nine digits long).

- Employee information is sent from the ForwardHealth Portal to Sandata nightly. The nine-digit ID issued on the ForwardHealth Portal will become their Santrax ID.

- Sandata adds the employee to the provider's Sandata EVV Portal.

- Sandata sends an email to the employee, including a temporary password for the Sandata Mobile Connect app.

- As needed, the provider updates employee information in the secure ForwardHealth Portal.

**TIP:** DHS recommends adding ForwardHealth Portal employee maintenance to the provider's human resource on- and off-boarding processes. This will make it easier to keep the employee information up-to-date in the ForwardHealth Portal and Sandata.

Here is a common question about this process:

**How long does it take for an employee added in the ForwardHealth Portal to get to**

**Sandata?** One day. If an employee's information from the ForwardHealth Portal doesn't populate a provider's Sandata EVV Portal the next day, contact EVV Customer Care.
 Let's take a closer look.

# Employee Information

- All workers are added through the ForwardHealth Portal.
- Independent nurses need to add themselves as a worker in the ForwardHealth Portal.
- EVV Portal Functionality User Guide, P-02713, gives step-by-step instructions.
- The ForwardHealth Portal creates the worker's ID.

User Guide

Electronic Visit Verification
Portal Functionality

June 23, 2023

WISCONSIN DEPARTMENT
of HEALTH SERVICES
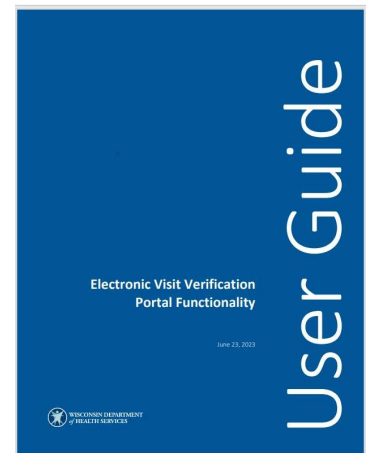
First, in the ForwardHealth Portal, make sure workers are added and then linked (or "associated") to the provider. The ForwardHealth Portal uses "worker," so we'll use it here, too.

For EVV information to flow properly, all providers have to identify the workers who capture EVV information. In the case of independent nurses—agencies of one—your only worker is yourself! You will need to link your "worker self" to your "agency self" in the ForwardHealth Portal.

The easiest way is to follow the step-by-step directions in chapter 7 (Worker Association) of the EVV Portal Functionality User Guide. There are images that show you exactly what to click all along the way.

(By the way: This same user guide will show you where to update your agency's email address and other contact information. While you're there, be sure to confirm your agency email!)

The ForwardHealth Portal creates a unique worker ID for each worker. That information is sent to Sandata,

# Employee Information

## Employee information can be viewed in the Sandata EVV Portal.

| NAME | STATUS | EMPLOYEE ID |
|---|---|---|
| Test, John | ● Active | 850215 |
| Trainerone, One | ● Active | 910310500 |
| Trainerthree, Three | ● Active | 910310502 |
| Trainertwo, Two | ● Active | 910310501 |
| TSERINGXXX, SHERPA | ● Active | 100006154 |
| Unit, Rounding | ● Active | 342262 |
| WITester-Update, Travis | ● Active | 741516773 |
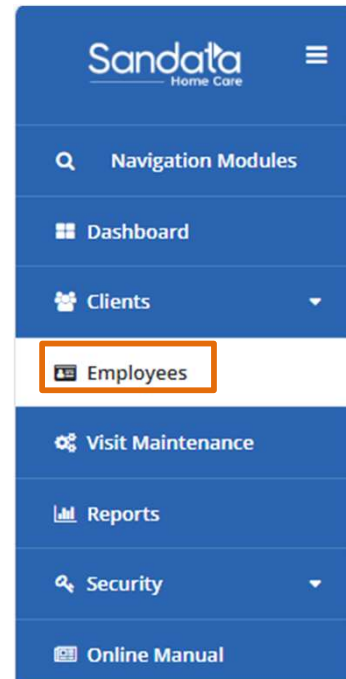
Why should employees get added to the ForwardHealth Portal?

That worker ID from ForwardHealth becomes the "Santrax ID" or "Employee ID" within Sandata. Providers can view this ID number in the ForwardHealth Portal or the Sandata EVV Portal. It is also viewed in the Sandata EVV Portal by opening the "Employees" module, shown here.

Be sure to share the ID number with the worker. They'll need this ID to use TVV and FVV methods of checking in and out.

# Employee SMC Access

Make sure employees receive this Sandata email.

- Sandata will email the employee a temporary password and the Company ID.
- The employee's email listed in the ForwardHealth Portal is also their SMC username.
- Employees can use the same email for multiple providers.



Hi _____

Your username to login to Sandata Mobile Connect is _____ and your temporary password for Company ID 2-60110 is:

**6yv57U!2**

Please remember to take your Company ID, Username and Temporary Password with you for your next client visit. Your temporary password will expire on 4/15/2019. If your temporary password expires or if you experience any issues with logging into Sandata Mobile Connect, please contact your EVV Administrator or your EVV program's Customer Support.

Sandata Mobile Connect © operates under U.S. Patent Nos. 5,835,575 and 5,949,856, which are owned by Sandata Technologies, LLC Copyright ©2019 Sandata Technologies, LLC. All rights reserved.

Heads' up!

Within two days, Sandata sends an email to the employee (including independent nurses). Here's an example of the email the employee receives from Sandata. It gives them the information they need to start using the Sandata Mobile Connect (SMC) app to check in and out for visits.

- The username will be the same as the employee's email address. The employee email address cannot be shared and used by other employees, since it is used to log in to the SMC app and identifies "who provided services," one of the federally required pieces of data.
- A temporary password is provided. This is able to be used once and expires after 60 days.
- Since an employee can be associated to different providers, the unique Company ID (identifying the provider agency) is included in this email. Please note the provider agency's name is not shown. If an employee works for several providers, they will need to know the company ID for each provider. The employee will need this Company ID to sign into the SMC app.

Check with your employees to be sure they receive this email within two days of being entered into the ForwardHealth Portal. It may be in their spam folder. Independent nurses, as employees you'll receive this email two days after you've associated yourself to your business in the ForwardHealth Portal. This is for your second role as "employee," in addition to your first role as "administrator."

# Live-In Workers

All live-in workers need worker ID numbers.
- BadgerCare Plus and Medicaid refer to Topic 21777.
- Family Care or Family Care Partnership refer to Topic 22957.
- IRIS providers should reference IRIS EVV Policy, P-03053 (PDF)

For a list of service codes and EVV requirements for live-in workers, please refer to www.dhs.wisconsin.gov/evv/service-codes.htm

While we're on the topic of workers: In Wisconsin, all live-in workers need worker ID numbers, even if they are not required to use EVV. Be sure to enter all workers into ForwardHealth.

If you hire live-in workers, make sure to get the program specific information you need, as shown on this slide, for:
- BadgerCare Plus and Medicaid
- Family Care or Family Care Partnership
- IRIS

Some live in workers may not need to capture EVV. Refer to the webpage shown at the bottom of this slide for a complete list.

In order to be exempt from capturing EVV, a personal or supportive care worker's live-in status must be verified. The name and address of the live-in worker should exactly match the information contained in the submitted supporting documentation.

Is a client's address causing issues on live-in worker forms? Call EVV Customer Care and ask to escalate unresolved address matching issues for live-in workers.

# Apply Your Knowledge

True or False?

- Providers can add and delete employees directly to the Sandata EVV Portal.

- All employees, including live-in workers, should have a worker ID from the ForwardHealth Portal.

False

True

Let's pause here for an informal quiz:

Providers can add and delete employees directly to the Sandata EVV Portal.
FALSE: Employees, including independent nurses, are added and kept up-to-date in the ForwardHealth Portal.

All employees, including live-in workers, should have a worker ID from the ForwardHealth Portal.
TRUE: DHS requires all workers to have a unique ID number.

# Call to Action

Make sure all employees' information is transferred to the Sandata EVV Portal.

If you hire live-in workers, review policy so you know if they are required to check in and out of visits using an EVV system.

Please make note of these important items to do:

- Make sure all employees' information is transferred to the Sandata EVV Portal.
- If you hire live-in workers, review policy so you know if they are required to check in and out of visits using an EVV system.

Curious for more?

Here's where you can find it.

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

Curious for more?
We've got it! Please see our Training Administrators webpage and open the "Employee data entry: Adding and editing workers" section. There, you'll find:

EVV Employee Data Entry PowerPoint: Searching for and viewing employee information on the Sandata EVV Portal

ForwardHealth Portal EVV Portal Functionality User Guide: Administrator instructions for using the ForwardHealth Portal, including Chapter 7 (Worker Association) and Chapter 8 (Manage Workers—to edit worker information, if needed)

How to Create and Maintain EVV Worker IDs video: Who needs a worker ID, obtaining a single worker ID, obtaining multiple worker IDs, managing (editing) worker information, and creating a worker list (19:29 minutes)

Refresher Training: Worker/Employee Data and Preventing Unknown Employee Exceptions video: How information is exchanged, worker email requirements, editing ForwardHealth worker information, adding visits for a new worker (31:15 minutes)

# Sandata EVV Methods

It's important to understand the different methods workers can use during their visits. Let's look at how workers check in and out of visits with the Sandata EVV Methods, including some Wisconsin-specific details the Sandata videos did not cover.

# Sandata EVV Methods

| Technology Type | Internet needed at point of care? | Cell service needed at point of care? | Collects six key data points ? |
|---|---|---|---|
| Sandata Mobile Connect (SMC) app | No | No | Yes |
| Telephonic Visit Verification (TVV) | No | No | Yes |
| Fixed Visit Verification (FVV) device | No | No | Yes |

Workers have two main EVV options to check in and out of a visit. An A worker may check in using one method and check out using the other, if needed. The two ways are:

- Mobile visit verification using the Sandata Mobile Connect (SMC) app.
- Telephonic visit verification (TVV) using the client's landline or fixed VoIP phone (for example, a phone line provided by a cable company).

A third method is FVV, using a small device that is fixed (that is, permanently attached) in the client's home. FVV is only approved when no other options are available. The small device must be ordered for the client on the Sandata EVV Portal. We'll have more about that in a few slides.

Please note: all of these methods can be used, even in locations where internet and cell service are not present.

# Sandata EVV Methods

- How does a worker record an overnight visit?

  They should check in when they arrive and check out just prior to leaving, as usual. workers do **not** need to check out and in again at midnight.

- What about visits that last more than 24 hours?

  Sandata will automatically end visits after 25 hours. This is to prevent visits from remaining open forever. If a visit is longer than 24 hours, the worker should check out and then back in near the 24 hour mark.

Here are some questions and answers that apply to all the methods:

**How does a worker record an overnight visits?**

They should check in when they arrive and check out just prior to leaving, as usual. workers do **not** need to check out and in again at midnight.

**What about visits that last more than 24 hours?**

Sandata will automatically end visits after 25 hours. This is to prevent visits from remaining open forever. If a visit is longer than 24 hours, the worker should check out and then back in near the 24 hour mark.

# EVV Correction Log

Use this resource from the Wisconsin EVV Supplemental Guide:

**Member/Participant Name or Sandata Client ID:**

| Worker Name and Santrax ID | Date of Visit | Write in what needs correction: | | | |
|---|---|---|---|---|---|
| | | Time In | Time Out | Service Code | Tasks and Notes (If Required) |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

For any visit, providers can modify this sample chart to keep track the EVV data that needs corrections. It could be something the worker fills out and turns in, or perhaps an administrator fills it out when a worker contacts them with an edit. It's not required but may be helpful.

This sample chart is in the appendix of the Wisconsin EVV Supplemental Guide.

# Sandata Mobile Connect App

- The SMC app option is the most efficient and accurate.
- Does not require Wi-Fi or internet service after first set up.

| | | |
|---|---|---|
| **Faster!** | **Most Accurate** | **Fewer Exceptions** |

www.dhs.wisconsin.gov/library/collection/p-02751

There are a few points we'd like to emphasize.

The SMC app is much faster and more efficient for you than the other methods. Many prefer using it since there is greater accuracy. This means fewer errors, or exceptions, for a provider administrator to correct later.

Please refer to the EVV Sandata Mobile Connect Essentials training in the link at the bottom of the slide for further information.

# Tasks and Client Verification

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

These are not required in EVV for independent nurses.
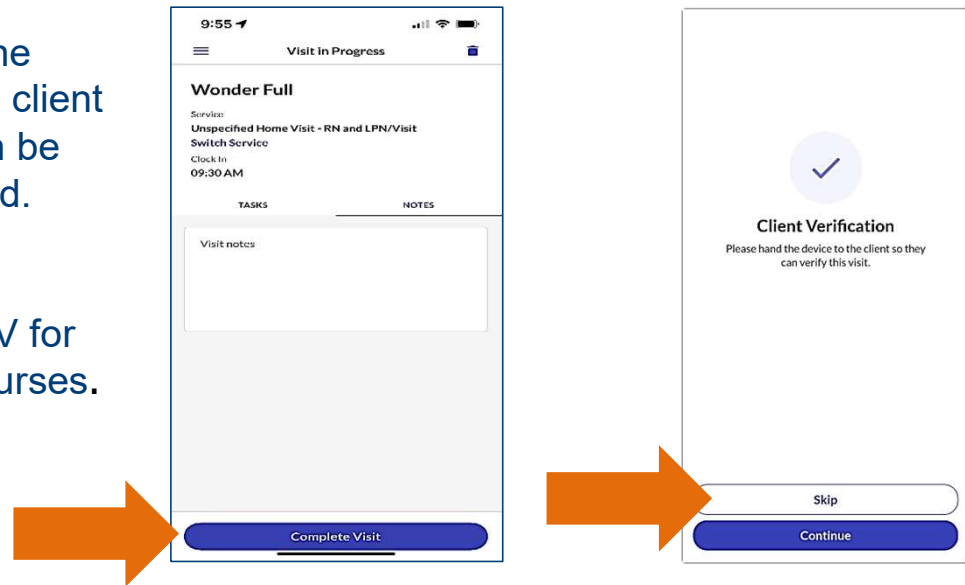
Some providers use EVV to collect record of care information, especially for service code T1019 (personal care services). This information includes tasks (the small details of a visit, such as helping someone brush their teeth), notes, and client signature. The SMC app, and TVV can gather this information. If your provider agency would like this information included in EVV, let your workers know.

However, provider agencies **not** requiring tasks or client confirmation through EVV can instruct their workers to skip the task and client verification portion of EVV. Independent nurses, for example, are not required to include tasks or client confirmation.

This slide shows screens from the SMC app that the employee will see when they check out of a visit. If record of care information is not needed:
- On the left screenshot, the worker completes the visit without going to the "Task" or "Notes" tabs.
- On the right screenshot, the worker chooses "Skip" on the Client Verification screen.

# Tasks and Client Verification

In TVV and FVV: Provider agencies **not requiring tasks or client confirmation** can instruct their workers to accept the service code and then hang up.

11. 🖐 **Press the Service ID number for the service you performed.**
    Refer to your agency's service list.

    📞 Santrax will say: **"You entered (SERVICE). Please press one (1) to accept, two (2) to retry."**

12. 🖐 **Press the one (1) key to accept or press the two (2) keys to retry.** ⬅ Then hang up.

What about TVV and FVV? Can tasks and client verification questions be skipped there? Yes.

If you do not require tasks or client confirmation through EVV, refer to the portion of the TVV or FVV call reference guide scripts shown on this slide.

Workers who are **not** required to collect record of care information for service code T1019 (personal care services) can confirm the service code and then end the call (hang up).

# Telephonic Visit Verification (TVV)

**Landline phones are used for TVV.**

**Cell phones are not allowed for TVV.**

One last note about Telephonic Visit Verification (TVV):

Cell phones are not allowed for TVV. The Sandata EVV system needs to confirm the location using a landline or fixed VoIP (Voice over Internet Protocol) connection (for example, a phone service provided by a cable company). It confirms the location just like 911 emergency system does. It cannot do this if a cell phone is used.

# Fixed Visit Verification

A device should only be requested by the provider or FEA if:
- The client does not have a landline or fixed VoIP home phone.
- The worker does not have a smartphone or tablet device that would support the SMC app.
- The client does not have a smartphone or tablet device that would support the SMC app.
- The client has a smartphone or tablet device, but it is not available for EVV purposes.

Now, a few Wisconsin-specific notes about fixed visit verification devices: FVV devices are the data collection method of last resort. FVV uses a small electronic device that is fixed (attached) to a surface in a client's home. The device generates codes containing visit data. Later, the worker will call in and enter these codes, also known as visit verification numbers. Because of these extra steps, FVV use is less convenient and is more prone to entry errors. Administrators may have more exceptions to correct in the Sandata Portal.

Specific to Wisconsin, a device should only be requested by the provider or FEA if services are anticipated to be authorized for more than 60 days **and** the following criteria are met:
- The client does not have a landline or fixed VoIP home phone.
- The worker does not have a smartphone or tablet device that would support the SMC app.
- The client does not have a smartphone or tablet device that would support the SMC app.
- The client has a smartphone or tablet device, but it is not available for EVV purposes.

# Fixed Visit Verification

Devices must be returned if:
- The worker has access to another EVV method.
- The client is no longer authorized to receive services.
- The provider is no longer authorized to provide the services.
- The device is not used for three months.

The DHS Office of Inspector General (OIG) will closely monitor the use of FVV devices.

In Wisconsin, devices must be returned if:
- The worker has access to another EVV method.
- The client is no longer authorized to receive services.
- The provider is no longer authorized to provide the services.
- The device is not used for three months.

To return the device, the provider or FEA should contact Wisconsin EVV Customer Care. Sandata will send a pre-paid return package directly to the client's home.

If the device is not used for three months, DHS will request the return of the device.

The DHS Office of Inspector General (OIG) will closely monitor the use of FVV devices.

# Fixed Visit Verification

## Use this resource from the Wisconsin EVV Supplemental Guide:

**Member/Participant Name or Sandata Client ID:**

| Worker Name and Santrax ID | Date and Time of FVV Device Use | Write in these details from the FVV visit: | | Service Code | Tasks (if required) | Date Verification Codes Were Called In |
|---|---|---|---|---|---|---|
| | | Verification Code Received When Checking In | Verification Code Received When Checking Out | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Providers can modify this sample chart to help the worker stay organized. It's not required, but it will help the worker keep track of the details they will need to call in.

The provider or FEA should consider any guidelines they would like their workers to use for recording the check-in and check-out codes and calling in the codes (such as who will call in the codes and when the codes will be called in). Options may include asking workers to call in codes the same day services are provided or turn in visit information to an office staff person to call in. The codes expire and cannot be called in after seven days.

A best practice is to call in the codes daily to keep the Sandata EVV Portal up to date.

You can find this sample in the appendix of the Wisconsin EVV Supplemental Guide.

# Group Visits

Group visits allow one check in and out for services to multiple clients at the same time. The clients must be:
- In the same location
- With the same provider
- With the same payer

If more than one worker is involved, each worker should start their own group visit.
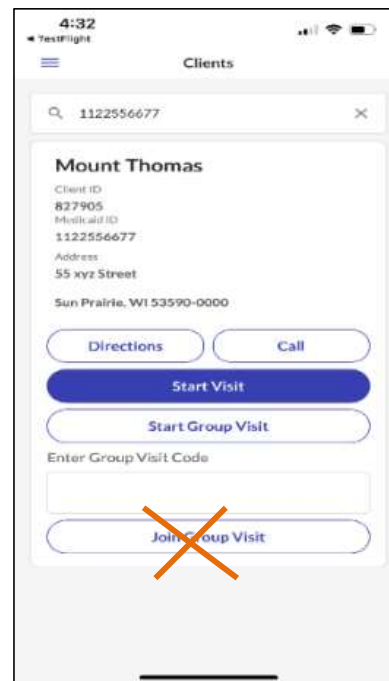
Let's move to some Wisconsin information about group visits.

**What is a group visit?** DHS defines a group visit as a worker providing care to several clients. Group visits allow a one check in and out for services to multiple clients at the same time if they are:

- In the same location
- With the same provider
- With the same payer

If more than one worker is involved, each worker should start their own group visit.

Here we have a screenshot of how to start a group visit using the SMC app. Sandata's "Join a Group Visit" option, as shown here with an X over it, should not be used in Wisconsin.

A group visit can also be called in on TVV.

(Group visits are not an option using FVV, since each client will need to have an FVV device assigned to them.)

A group visit may be ended for each client individually or all at the same time.

Providers who enter group visits manually in the Sandata EVV Portal can choose to log the

visit to each client separately or can choose to enter as a group visit. DHS does not require group visits to be identified.

# Worker ID 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 |

P-02844A (10/2023)

www.dhs.wisconsin.gov/publications/p02844a.docx

58

**TIP:** One of the best tips we have for you is the Worker ID card. It's available on the DHS EVV website to print out and fill in with the information the worker needs. You can find it on our Resource page, Training Workers page, or by using the link here. It's not required, but it will help workers stay organized.

You can fill in this information, so your workers have the what they need, when they need it to be successful!

- The toll-free phone number assigned to the provider in case the worker uses TVV
- The agency or company ID assigned by Sandata
- The worker's Santrax ID
- The worker's SMC username, which is simply their email address
- The client ID from Sandata
- The service codes for the care they are providing

Be sure to also let workers know if recording tasks is required – see the bottom of the first column where this question is printed.

A little about that chart on the right: Notice that these are very broad categories of care. Be sure workers know the correct service code.

- The first column ("service code") is information familiar to administrators who take care of billing or authorizations.

- The last two columns are the ones workers need to pay attention to. Let workers know which service they are doing. For example, if they are doing personal care services, that's not quite enough information. workers need to know if it's the first line, **Personal care services/15 minutes** or the fourth line on this chart, **Personal care/per day**. The service they enter in EVV must match the service listed on the client's authorization.

- The last column on the chart is what the worker will enter if using TVV or FVV.

# Apply Your Knowledge

**True or False?**

- Cell phones can be used for the SMC app or for TVV.

  <span style="color:red">False</span>

- Workers will intuitively know what service to enter for their EVV visit.

  <span style="color:red">False</span>

Let's pause here for an informal quiz:

Cell phones can be used for the SMC app or for TVV.
FALSE: Cell phones—specifically smartphones or tablets—should use the SMC app. Cell phones, including flip phones, should not be used with TVV.

Workers will intuitively know what service to enter for their EVV visit.
FALSE: Providers should be sure workers have this information. It can be highlighted on the Worker ID card so the worker has it at their fingertips.

# Call to Action

- Provide a Worker ID card or a similar tool to each worker. Set them up for success!

- Decide what sample forms, if any, you'd like to use from this section.

Please make note of these important items to do:

- Provide a Worker ID card or a similar tool to each worker. Set them up for success!
- Decide what sample forms, if any, you'd like to use from this section. They are all located in the EVV Supplemental Guide's appendix:
    - EVV Correction log
    - FVV log

Curious for more?
We've got it! Please see our Training Administrators webpage and open the "Visit methods" section. There, you'll find:

Requesting a Fixed Visit Verification Device *video* / Requesting a Fixed Visit Verification Device *PowerPoint*:
Both cover FVV requirements and how to request an FVV device in the Sandata EVV Portal.

# Curious for more?

Here's where you can find it.

The Training Workers webpage has videos and PowerPoints about:
- Getting started
- SMC app use
- TVV use
- FVV use

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

You can also use 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 ID card is also on this webpage in the "Getting started" section.

# Visit Maintenance

We've come a long way! Once an employee (including independent nurses) collects the visit information, the administrator (including independent nurses) can view and correct the information in Visit Maintenance.

# EVV Visit Lifecycle

**Verification**

Visits with all six required data elements are considered verified visits.

If necessary, the provider agency administrator makes manual edits in their EVV system to complete or correct the visit record. Sandata sends all of the day's visit files, including any edits and visits received from alternate EVV vendors, to DHS after midnight.

DHS then sends verified visits to the appropriate program payer the following day to be used for claims processing.

**Validation**

Visits should be in a verified status in the EVV system prior to the claim being sent. Incomplete visit records (those missing information) will not be used for claims or encounter processing.

The claim must correspond to the EVV visit record. This step ensures that each personal care or applicable supportive home care service has corresponding EVV data to support payment.

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

64

When a worker checks in and out of a visit, their visit information automatically flows into the Sandata EVV Portal. If there is missing or inaccurate authorization information, this will need attention. If the worker entered the wrong information or the visit is missing information, this will need correcting. This administrative work is "verification." This is done in the "Visit Maintenance" portion of the Sandata EVV Portal. It is the step you see on the top of the slide.

Why is verification important? Because of the next step.

That step is validation. Only visits with complete information, those that are verified, are automatically forwarded to the payer. The payer will hold that EVV visit information. When the provider sends a claim (using the usual process, outside EVV), the payer will see if EVV information is available to support the claim. This is how the payer validates the claim.

What if verification was not done, and the visit's errors or missing information not corrected? The EVV visit would not be sent to the payer, and the payer cannot validate the claim sent outside EVV. The claim cannot be paid.
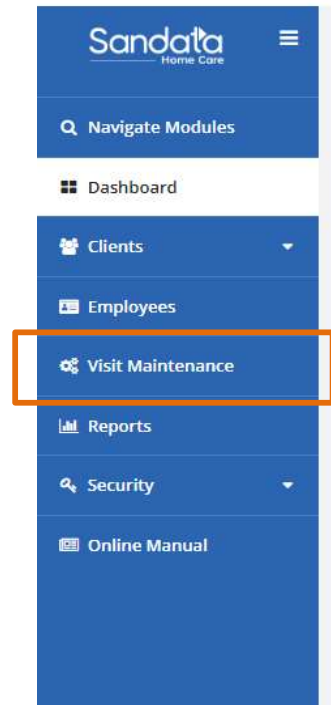
Bottom line: By verifying visits, you are helping ensure claims are validated and your agency gets paid.

The flyer linked here has a great summary of this process. We recommend taking a look at to deepen your understanding of EVV and claims.

Visit Maintenance is the Sandata EVV Portal module where visits are:
- Viewed in near real-time.
- Edited to include all required information.
- Corrected and cleared of exceptions (errors and omissions).
- Confirmed to be in a "verified" status prior to submitting claims outside EVV.

# Visit Exceptions

| Exception | Setting |
|---|---|
| Missing Service | Fix |
| Unauthorized Service | Fix |
| Unknown Client | Fix |
| Unknown Employee | Fix |
| Unmatched Client Phone / ID | Acknowledge |
| Visits Without In Calls | Fix |
| Visits Without Out Calls | Fix |

**Tip:** GPS exceptions are informational only and do not need to be corrected.

Visit exceptions occur when the EVV system identifies missing visit data. For each exception, the following have been defined for Wisconsin:

- Fix—Visit information must be added to be considered complete.

- Acknowledge—Incomplete visit information must be acknowledged by a system user to be considered complete. In Wisconsin, an unmatched client phone/ID is the only type of exception that will need to be "acknowledge." If a visit was called in on TVV from an unexpected phone number, we can't travel backwards in time to change the phone number used, so the unusual phone number is simply "acknowledged."

Please note: In Wisconsin, GPS location will be flagged only as an informational exception if it is not near a known address for the client. This is not an exception that will prevent a visit from being verified. For this reason, it is not listed on the chart above.

Providers can use location as part of their own quality assurance or internal audit practice. If a location seems unusual for the client, the provider may want to follow up with the worker to get more details or provide client-specific information to ensure the best support. DHS will not deny a claim because of GPS information; however, other divisions within DHS, such as the Office of Inspector General (OIG), may use GPS location data to ensure providers bill for covered services.

# What Sandata does NOT do in Wisconsin

The Reason Code section for edited visits is not considered proof of documentation.

- Providers should maintain separate documentation.

- EVV does not change written documentation retention requirements.

Please note : Any time you edit a visit, you'll need to include a reason. You also have the option to include a note. This section is not proof of documentation.

- Separate documentation is required, outside EVV.

- EVV does not change written documentation retention requirements from Medicaid or payers.

# Apply Your Knowledge



True or False?

- A verified visit is automatically billed within EVV.    False

- An unusual location of visit (shown in GPS) will prevent the visit from being paid.    False

Let's pause here for an informal quiz:

A verified visit is automatically billed.
FALSE: Billing is done as before, outside EVV. Verified visits are sent to the payer so that the payer can compare the EVV visit information with the billing information.

An unusual location of visit (shown in GPS) will prevent the visit from being paid.
FALSE: GPS is informational only and gives providers the opportunity to ensure appropriate support for the client. GPS information may also be used by other divisions within DHS, such as the Office of Inspector General (OIG).

# Call to Action

Decide how often you will check visits to make sure they have a "verified" status.

Be sure visits have a "verified" status before submitting a claim outside EVV.

Please make note of these important items to do:

Decide how often you will check visits to make sure they have a "verified" status. You may need to check more often as your team learns EVV. Daily, three times a week, weekly—how often is up to you.

Be sure visits have a "verified" status before submitting claims outside EVV. After hard launch (October 1, 2024), claims without supporting EVV information will not be paid.

Curious for more?

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

EVV Visit Maintenance PowerPoint: Administrative use of the Sandata EVV Portal to make corrections or additions to visit data, including how to clear exceptions and how to prevent exceptions

Refresher Training: Overview of Visit Maintenance video: Understanding the visit life cycle, timeframe for edits, search filters, GPS (42:48 minutes)

Refresher Training: Visit Maintenance and Call Edits video: Editing calls, merging calls, entering manual calls, creating a call, preventing errors (27:14 minutes)

Refresher Training: Visit Maintenance and Clearing Exceptions video:  Clearing unknown client exceptions, unauthorized service exceptions, preventing errors (35:28 minutes)

# Curious for more?

## Here's where you can find it.

| Resource Title and Languages | Description |
|---|---|
| EVV Lifecycle flyer, P-03124 (PDF), in English | **DHS written material:** A snapshot of how EVV visit records fit into the general claims process |
| Fee-for-Service EVV Administrator Training; Claim Edits, in English ⊙ | **DHS video:** How EVV fits in the claim process, explanation of benefit codes for EVV, resolving edits, span billing, and best practices (29:47 minutes) |
| Fee-for-Service EVV Administrator Training; Claim Edits, P-03570, in English, Hmong, Spanish | **DHS PowerPoint presentation:** How EVV fits in the claim process, explanation of benefit codes for EVV, resolving edits, span billing, and best practices |

**www.dhs.wisconsin.gov/evv/training-administrators.htm**

---

Curious for more?

Also on our Training Administrators webpage and open the "EVV and claims (billing)" section. There, you'll find:

- EVV Lifecycle flyer: A flyer showing how EVV visit records fit into the general claims process.
- Fee-for Service EVV Administrator Training: Claim Edits: A video of how EVV fits in the claim process, explanation of benefit codes for EVV, resolving edits, span billing, and best practices.
- Fee-for-Service EVV administrator Training: The PowerPoint of the video listed above it.

# Reports and Record of Care

# What Sandata does NOT do in Wisconsin

**Reminder:** Schedules, payroll, billing, and claims are not part of the Wisconsin DHS-provided Sandata system.

Reports referencing these items will not provide results.

We've stated this before, but it's a good reminder when it comes to reports:
Sandata's trainings list schedules, payroll, billing, and claims as features; however, these are not part of the Wisconsin DHS-provided Sandata system. Reports referencing these items will not provide results.

# Record of Care

Personal care providers (service code T1019) may choose to capture the record of care within EVV. This includes:
- Tasks performed during the visit
- Notes from the visit
- Electronic signature or voice recording from the client to verify the services were provided

For more information, refer to the Record of Care and Timekeeping topic (#22859).

Personal care providers providing service code T1019 may choose to capture the worker record of care within EVV, or continue to do so outside of EVV. This includes:
- Tasks performed during the visit
- Notes from the visit
- Electronic signature or voice recording from the client to verify the services were provided

For more information, refer to the Record of Care and Timekeeping topic (#22859).

Home health care service providers, including independent nurses, should continue their regular documentation practices outside EVV. These providers do not need to collect record of care in EVV.

# Record of Care

**Employee Visit Log**

PAYER: ILIFE

| VISIT | | | | | | LOCATION IN | | LOCATION OUT | | EMPLOYEE | | | CLIENT | | | OFFLINE VISIT |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| PRG ⇅ | DATE ⇅ | TIME IN | TIME OUT | HOURS | STATUS | LATITUDE, LONGITUDE | PHONE # | LATITUDE, LONGITUDE | PHONE # | NAME ⇅ | EMPLOYEE ID ⇅ | SANTRAX ID ⇅ | NAME ⇅ | ID / MEDICAID ⇅ | SIG | |

- Date
- Service
- Time in
- Time out
- Hours

- Status
- Location (plus GPS)
- Tasks
- Employee name
- Employee Santrax ID

- Client name
- Sandata client ID/Medicaid ID
- Notes
- Client Signature was captured (Y/N)

75

The Employee Visit Log report is specific to Wisconsin. It can be used to summarize the Record of Care. The date range can be for any period of 31 days or less. Any visit in a verified status is included in this report. (Remember, a verified status means all required information is present and there are no errors.)

The Employee Visit Log report includes the visit details you see listed on this slide.

# Apply Your Knowledge

True or False?

- In Wisconsin, schedules, payroll, billing, and claims are included in the Sandata EVV system.

  False

- Tasks and client signature must be collected by all workers in EVV.

  False

Let's pause here for an informal quiz:

In Wisconsin, schedules, payroll, billing, and claims are included in the Sandata EVV system.
FALSE: These are not included in Wisconsin. Providers should use their current systems for these items.

Tasks and client signature must be collected by all workers in EVV.
FALSE: Personal care providers may choose to capture the worker record of care within EVV or continue doing so outside EVV. Home health care service providers, including independent nurses, do not need to collect record of care information in EVV.

# Call to Action

Decide which reports, if any, you will use.

Decide if you need workers to collect record of care information using EVV. If you are not collecting record of care information using EVV, let workers know to skip those entries.

Please make note of these important items to do:

Decide which reports, if any, you will use. For example: will you look at worker corrections, client care, authorizations that are due to expire?

Decide if you need workers to collect record of care information using EVV. If you are not collecting record of care information using EVV, let workers know. The default for each of the Sandata methods is to lead workers through steps that include tasks and client signature, but these can be skipped.

Independent nurses are not required to collect record of care information using EVV.

Curious for more?

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

Sandata EVV Portal Reports PowerPoint: Administrative use of the Sandata EVV Portal to create and download reports to monitor EVV success

Refresher Training: Reports and Capturing Record of Care video: Highlighted reports within the Sandata EVV Portal and data needed to capture record of care for personal care services (46:50 minutes)

# Next Steps

# Best Practices

- Confirm client authorizations in your EVV system in a timely manner.
- Ensure information in Sandata is complete and accurate.
- Help your workers develop good EVV habits.
- Follow up with workers using EVV. Help them be successful so you can be successful!
- Review EVV visits in the Sandata EVV Portal regularly to look for errors.
- Correct exceptions and confirm all visits are in a verified status before claim submission.

Before today you watched the Sandata administrative training videos. And today we walked through what is different in Wisconsin. As you continue with EVV, we have a few best practices for you to consider:

- Confirm client authorizations are in your EVV system in a timely manner.
- Ensure information in Sandata is complete and accurate, especially if you need to add authorization information to the Sandata EVV Portal.
- Help your workers capture accurate and complete visit information right from the start. Over time and with follow-up, good EVV habits will develop.
- Follow up if there are difficulties in recording a visit. Expect that it will take up to three weeks for EVV to become a habit. Help workers be successful so you can be successful!
- Review EVV visits in the Sandata EVV Portal regularly to look for errors.
- Correct exceptions and confirm all visits are in a verified status before claim submission.

# Next Steps

- System set up
- Training set up
  - Train additional administrators
  - Train workers
- FVV device orders, if needed

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

The EVV Providers and Independent Nurses webpage, QR code and link here, has a very thorough list you can check off. In general, get your feet on the ground:

- Login to the Sandata EVV Portal. Take a look around. Add anyone who will be doing administrative tasks with you.
- Train your team! Review for yourself! Remember, our Training webpage has resources for you to use, including videos and PowerPoints that go through every process.
- If you've situations in which a smart phone, tablet, or landline is not available, order FVV devices. FVV is the method of last resort since it is more prone to human error, but it is an option when other methods are unavailable.

# Next Steps:

- Be patient.
- Ask questions.
- Take advantage of EVV Customer Care support.
- Pay attention to your payers' claims messaging.
- Review and use EVV resources.
- Elevate concerns.

As you begin EVV.

1. Be Patient! Practice, practice, practice! You're learning something new. Expect it to 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. Monitor payers' claims messaging on EOBs or RAs to reduce resubmissions for denied claims at hard launch. Contact your payer or Wisconsin EVV Customer Care if you're unsure why a claim would not be paid.
5. There are many resources on our EVV website. Take some time to familiarize yourself with the worker trainings, admin trainings, and resources available.
6. And please speak up. Please don't push off concerns. Bring them to our EVV Customer Care team.

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

# Keep in Touch

- Watch for 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!

•Watch for 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.
•Could you benefit from a one-on-one session? 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.

The EVV Customer Care contact information is on this slide. It is also on every EVV webpage.

# Thank You

Thank you for the important services you provide to members.

**WISCONSIN DEPARTMENT** *of* **HEALTH SERVICES**