

Fixing Unknown Client Exceptions in the Sandata EVV Portal

Exceptions are mistakes or incomplete information that keep electronic visit verification (EVV) visits from reaching verified status. They have to be fixed by an EVV administrator in the Sandata EVV portal so claims can be paid. Providers using the Wisconsin Department of Health Services (DHS)-provided Sandata system can see and fix exceptions in their Sandata EVV portal.

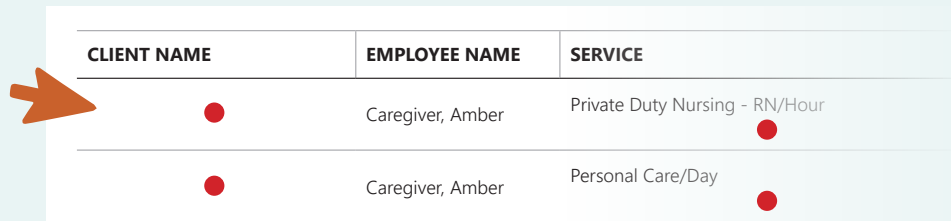
Unknown Client Exception

One of the most common exceptions is called Unknown Client. Providers, including independent nurses, may see an Unknown Client error in their Sandata EVV portal when visits aren't linked to a member or participant. This is flagged by a red dot under Client Name on the portal (see image 1).

Follow the instructions from the Correcting Unknown Client Exceptions section of the EVV Visit Maintenance training, P-02754 (dhs.wi.gov/library/collection/p-02754),* to add the client to the visit if the worker did not enter the client ID or entered the wrong ID.

Tip

When fixing exceptions in the Sandata EVV portal, Unknown Client is a good exception to start with. Click Client Name, indicated with a red dot (see arrow next to the image below) to add the client name. Adding in client details that allow the system to match a client to a visit may automatically clear other exceptions for that visit.



CLIENT NAME	EMPLOYEE NAME	SERVICE
●	Caregiver, Amber	Private Duty Nursing - RN/Hour ●
●	Caregiver, Amber	Personal Care/Day ●

Learn More

Visit dhs.wi.gov/evv.

Sign up for emails: public.govdelivery.com/accounts/WIDHS/subscriber/new?topic_id=WIDHS_190

Wisconsin EVV Customer Care

Email: vdxcontactevv@wisconsin.gov

Phone: 833-931-2035

Monday–Friday, 7 a.m.–6 p.m. Central time

What Causes the Unknown Client Exception?

How to Prevent and Fix

DHS wasn't able to send the authorization to Sandata because one of the following is true:

- DHS doesn't have an authorization from an HMO, managed care organization (MCO), or IRIS (Include, Respect, I Self-Direct).
- DHS has an expired HMO, MCO, or IRIS authorization.

Providers should:

- Confirm the payer has authorized the services.
- Once confirmed, wait three days for the authorization to arrive in Sandata's system, which automatically clears the exception if the worker entered the client ID at the time of the visit.
- Contact their payer if an expected authorization hasn't come through in three days.
- Contact EVV Customer Care if further assistance is needed with the payer.

Services are allowed by policy but an authorization will not be created in the provider's Sandata EVV portal (for example, a fee-for-service member is receiving less than 50 hours of personal care services, or an independent nurse is working with a prior authorization liaison [PAL]).

Providers should add member and authorization information by following the steps given in the Adding Required Authorization Information in the Sandata EVV Portal training, P-03550 (dhs.wi.gov/publications/p03550.pdf).*

Telephonic visit verification is called in from a phone number not listed on a member's or participant's file.

Providers can add landline or fixed Voice over Internet Protocol (VoIP) phone numbers in the Sandata EVV portal using steps in the Modify Client section of Clients Module training, P-02749 (dhs.wi.gov/library/collection/p-02749).*

The member's or participant's ID is not entered correctly in the Sandata Mobile Connect app.

When checking in and out, the worker should:

- Check the Client ID.
- Carefully re-enter the Client ID.

Providers can:

- Confirm the member or participant ID.
- Manually edit the visit to link to the member or participant.

The worker calling in fixed visit verification values enters the member's or participant's ID wrong.

The worker should:

- Carefully re-enter the Client ID.
- If the Client ID still isn't working, hang up and call again, entering the numbers carefully.
- Contact the provider to confirm the Sandata Client ID, then try the call again.
- Refer to the EVV Fixed Visit Verification Process training, P-02753 (dhs.wi.gov/library/collection/p-02753).*

*All EVV trainings are on the DHS EVV Training page at dhs.wi.gov/evv/training.htm.

Providers can give workers a Worker Visit Card, P-02844A (dhs.wi.gov/publications/p02844a.docx), to take with them on visits. These printable cards can be filled in with important phone and ID numbers, usernames, and service codes needed to capture EVV visit details. Providers can also use the Important Numbers for EVV in Wisconsin, P-03573 (dhs.wi.gov/library/collection/p-03573), to help locate the numbers to fill in the Worker Visit Card.