# Sandata EVV Portal Dashboard and Reports for Administrators

## Sandata EVV Portal Dashboard

In order for electronic visit verification (EVV) claims to be paid, visits must be in the "verified" status. Verified visits don't have any exceptions, or errors, in the Sandata EVV system. Providers can find information about exceptions on the Sandata EVV portal dashboard, which is the first screen that appears after logging in. By default, it will show exceptions from today's visits.

### Using Visit Maintenance

To see all exceptions, administrators can click Visit Maintenance in the menu on the left side of the screen and then click Filters in the upper right corner. From this screen, they can select either All Visits or All Exceptions. The filter default is All Visits.

Providers will see the filtered list of visits. Administrators can then click any of the red or orange dots to fix or acknowledge exceptions. Yellow dots do not need to be fixed or acknowledged.

### Creating Custom Displays

Administrators can create custom displays using the Filter and Show Display options on the Visit Maintenance page. They can export these displays like reports:

1. From the Visit Maintenance screen, click Filters. Choose filters to show the visits you want to see.

2. Click Show Display Options to choose which columns of information to display for each visit.

3. Click Export Data and save the display as an Excel, CSV, or PDF file.

## Pro Tip

If you open the Sandata EVV portal in two browsers (for example, Chrome and Firefox), you can have two different parts of the Sandata EVV portal open at the same time. For example, you can see the client or employee module while you're correcting exceptions in the Visit Maintenance screen. After you save your changes, you can refresh both browsers.

# Reports

The Wisconsin Department of Health Services (DHS) sends information about clients, workers, and authorizations to Sandata every night. Providers can use reports to see this information in the Sandata EVV portal the next day. These reports also include visit information and information added by administrators.

To find report options, click Reports in the EVV portal's left navigation panel and click the type of report you want to build.

**Note:** Claims and scheduling are not part of the Wisconsin DHS Sandata system, so reports for that information won't return results.

| Report | Type |
|---|---|
| **Authorizations** | **Authorizations** <br> Providers can use this report to see all clients with an active authorization for the date span entered. |
| **Active Clients** | **Daily** <br> Providers can use this report to compare their client list to clients who are active (not pending) in their Sandata EVV portal. Providers should make sure their clients' addresses and phone numbers are accurate. Providers can also use this report to find Client IDs when employees need them to check in and out. |
| **Active Employees** | **Daily** <br> Providers can use this report to compare the names and emails of their employees to what is in the Sandata EVV portal and to find their employees' Santrax ID. Checking information on this report can help providers troubleshoot when a worker cannot check in or out of a visit. |
| **Detail Visit Status** | **Data Range** <br> This report shows visits with an "incomplete" status. These visits have exceptions. Visits with exceptions won't be sent to payers until they are corrected. <br><br> Exception information available on this report can be used to: <br> • Show providers where workers need more training. <br> • Understand information that needs to be fixed. <br> (For example, if an Unknown Client Phone/ID error shows up for telephonic visit verification calls for a certain client, providers can check that the client's phone number is correct in the Sandata EVV portal.) |
| **Employee Visit Log** | **Data Range** <br> This report includes visit details like the service performed, check-in and check-out times, visit status, worker and member IDs, the location of the visit, tasks, and client verification (signature or voice recording), if used. It shows all required elements in a fee-for-service personal care worker record of care. |

Find additional information about the dashboard and reports in the EVV Visit Maintenance trainings, P-02754, and the Sandata EVV Portal Reports training, P-02756.