Editing Client Information in the Sandata Electronic Visit Verification Portal

WISCONSIN DEPARTMENT of HEALTH SERVICES

P-02749 (01/2025)

Agenda

- Client Information
- When to Edit Client Information
- Search for the Client
- Add Valid and Verifiable Address or Phone Number
- Change Client Status
- Change Start of Care (SOC) Date
- Available Resources

In this training we will review :
How most clients' information is loaded to Sandata, when to edit client data, how to search for a client in the Sandata EVV portal, changing a client's status, adding a valid and verifiable address or phone number, changing the start of care date. and available resources for extra help.

Client Information

It’s important to start out with an understanding of how most clients’ information is loaded to the providers’ Sandata EVV portal. Let’s take a peek behind the tech curtain!

Client Information

- The Wisconsin Department of Health Services (DHS) sends client information to Sandata based on the client's:
  - Approved authorizations for EVV services.
  - Medicaid client enrollment file.
- Both authorization and client files are sent to Sandata nightly.

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This is how most clients' information is loaded to the Sandata EVV portal:

The Wisconsin Department of Health Services (DHS) receives authorizations for members using fee-for-service, HMO, managed care organizations (MCOs), and IRIS (Include, Respect, I Self-Direct) services.
DHS then creates a client file that includes only the information Sandata needs for EVV. This is compliant with HIPAA (Health Insurance Portability and Accountability Act) privacy laws.

If the authorization is for an EVV-required service, DHS sends the client and authorization information to Sandata. Sandata places the client information into the correct provider's Sandata EVV portal account.

Both authorization and client files are sent to Sandata nightly.

Client Information

Client information moves from DHS to Sandata.

Non-DHS Authorizations
- HMOs
- MCOs

DHS Authorizations
- IRIS
- Fee-for-service Medicaid

DHS Creates
- Authorization file
- Client file

Sandata Populates
Provider's Sandata EVV portal client file

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Client information moves in one direction, from DHS to Sandata.
This graphic is showing how the information moves:

Authorization files are gathered from Non-DHS, (HMO and MCO) and DHS, (IRIS and fee for service Medicaid) sources.
Next, DHS creates a master authorization file and gathers the client information in a file. These are sent to Sandata.
Sandata then populates the correct provider's Sandata EVV portal client file.

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, contact the payer on the third day. If you are unable to find an answer with the payer, EVV Customer Care can help.

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 have more about that scenario in the "Adding Required Authorization Information in the Sandata EVV portal" training.

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 an 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

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 will occur in a calendar year
- Private duty nurses who are not the prior authorization liaison (PAL)

Use "Adding Required Authorization Information in the Sandata EVV Portal" in these situations.

There are some exceptions to how client information arrives in the provider's Sandata EVV portal. Certain services are allowed by policy without an authorization. In these situations, there is no authorization for Sandata. Therefore**,** 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 service 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).

Without an authorization, the Sandata system cannot capture error-free EVV visits. Therefore, for these service codes, DHS allows providers to enter the required authorization information in the Sandata system when necessary. Refer to the training, "Adding Required Authorization Information in the Sandata EVV Portal" in these situations.

When to Edit Client Information

When to Edit Client Information

Providers may need to update certain client information:

- To add a valid and verifiable client address for mailing a fixed visit verification (FVV) device.
- To add additional addresses for common locations of care.
- To add a valid and verifiable phone number to prevent an "unknown client" exceptions with telephonic visit verification (TVV).
- To ensure the start of care date captures the first EVV visit.

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We'll have more about how to do each of these later in this presentation:

If the client's address is incorrect, while waiting for the client to update the Medicaid system, the provider could add a valid and verifiable address to the Sandata EVV portal before ordering a fixed visit verification (FVV) device.

Adding an additional location also shows acknowledgement of common locations of care.

Another reason may be to add a valid and verifiable phone number to prevent "unknown client" exceptions when telephonic visit verification (TVV) is used. For example—If the service policy allows services in another location and there is a landline phone that is used for recording EVV visit information, providers may add that phone number. The Sandata system will recognize a call coming from that phone number as part of the client's record.

Finally, providers may need to edit the start of care date to match the authorization. The start of care date is auto populated as the date the client is added to the Sandata EVV portal. That may not match the first EVV visit date allowed. For example, if the payer sends an authorization on January 20th but backdates the services to begin January 15th, the Sandata start of care date will automatically be the date the file was received, January 20th. But if the provider began providing services on January 15th, as the authorization allowed, the start of care date will need to be changed to January 15th. This prevents an exception flag for those earlier visits. As always, providers should pay close attention to the payer-approved authorization start dates. Services should not begin prior to the date approved in the authorization.

When to Edit Client Information

If the client has not updated their address, the provider can add a valid and verifiable address or phone number to the Sandata EVV portal client profile.

- This will only update Sandata.
- It will not update ACCESS, SSA, or any other system.
- A "valid and verifiable" phone number means the client's landline or fixed Voice over Internet Protocol (VoIP) phone.

Providers can add a valid and verifiable address or phone to the Sandata EVV portal. As we mentioned, the client information flows one way, and any changes made in the Sandata EVV portal will not update the Medicaid file or any other systems.

Phone numbers should be a landline or fixed Voice over Internet (VoIP) phone. Fixed VoIP imitates a traditional landline: a base is plugged in to the wall or modem (for example, a phone line provided by a cable company).

A cell phone number should not be entered, since it does not provide the required location information.

When to Edit Client Information

- A client is required to keep their address current for Medicaid benefits. This has not changed with EVV.
- It is important that the client also keep their address current with all other applicable entities including the Social Security Administration and the foster care system.
- Helpful directions for phone and address changes and links can be found on the EVV FAQ webpage at www.dhs.wisconsin.gov/evv/faq.htm

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Keep in mind the official process for changing a client's address and phone number has not changed with EVV. Clients are required to keep their information up to date through their usual resources: the client's local income maintenance agency or tribe, online through the client's ACCESS account, or by using the Medicaid Change Report (F-10137). As always, IRIS participants can also update address and phone numbers with their IRIS Consultant Agent (ICA).

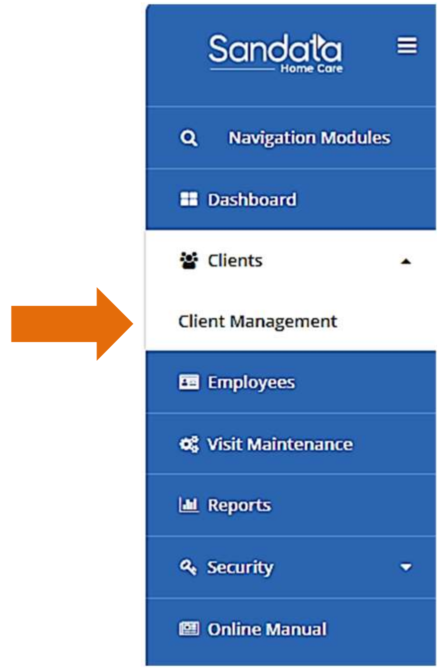
It is important that the client also keep their address current with all other applicable entities including the Social Security Administration and the foster care system.

The member/participant section of the EVV FAQs contains the usual directions and links for the client to update their information.

Search for the Client

Search for the Client

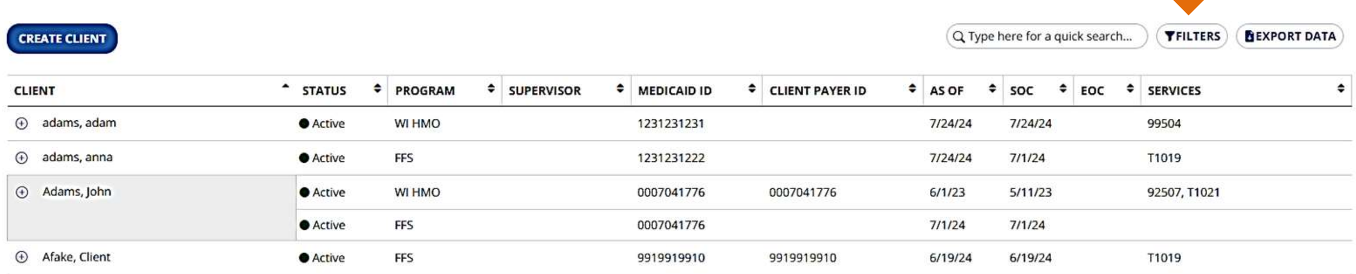
- Log in to the Sandata EVV portal.
- From the navigation panel, click **Clients** and then **Client Management**.



To search for the client:
Log in to the Sandata EVV portal.
Click Clients from the navigation panel, and then Client Management. There may be a pause while the client list loads.

Search for the Client

- By default, only clients with an "Active" status will show.
- Use the **Filters** button to find the client, if needed.

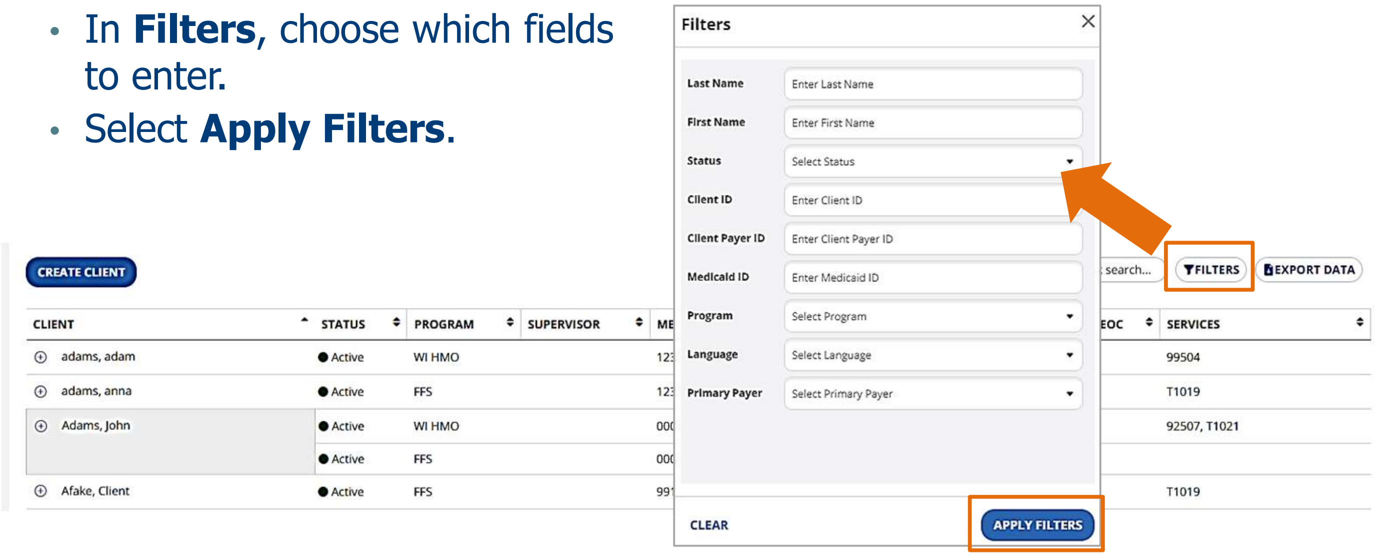


CLIENT	STATUS	PROGRAM	SUPERVISOR	MEDICAID ID	CLIENT PAYER ID	AS OF	SOC	EOC	SERVICES
adams, adam	Active	WI HMO		1231231231		7/24/24	7/24/24		99504
adams, anna	Active	FFS		1231231222		7/24/24	7/1/24		T1019
Adams, John	Active	WI HMO		0007041776	0007041776	6/1/23	5/11/23		92507, T1021
	Active	FFS		0007041776		7/1/24	7/1/24		
Afake, Client	Active	FFS		9919919910	9919919910	6/19/24	6/19/24		T1019

•By default, only clients with an "Active" status will show. All clients are entered into the Sandata EVV system with this "Active" status.
•If needed, use the Filters button to narrow the list or to find a pending or inactive client.

Search for the Client

- In **Filters**, choose which fields to enter.
- Select **Apply Filters**.



If you use the Filters option, you can choose which fields to enter. None of them are required.

You can enter in portions of a client’s name – for example, “Kell” if you’re not sure if it’s “Kelley” or “Kelly.”

Be sure the choice from the drop-down “Status” field fits your need: Active, Pending, or Inactive. For a list of all clients regardless of their status, change the filter to ‘Select Status.’ This will make sure the list includes active, pending, and inactive clients.

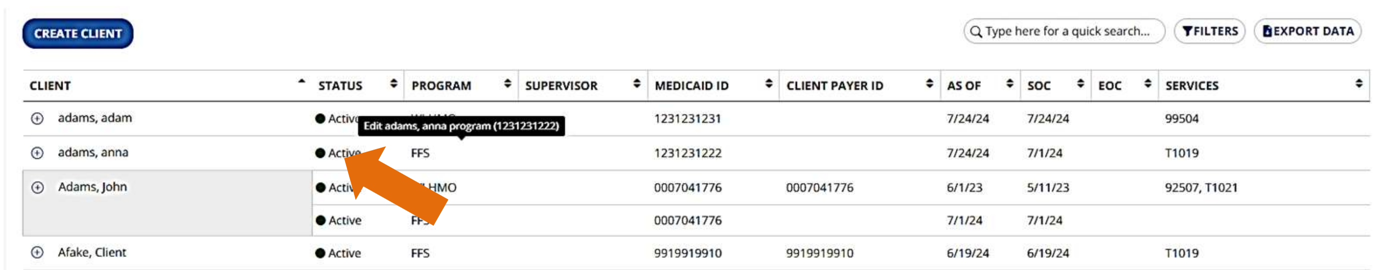
If the client is still not found:

- Their authorization has not been sent from the payer yet. If it’s been more than two days, call the payer to follow up.
- If the service does not have an authorization, you will need to add the client information as mentioned on slide 6.
- If you are an independent nurse who is not the prior authorization liaison, you will need to add the client information as mentioned on slide 6.

In all these cases, EVV Customer Care can help. (See the slide 31 for their contact information.)

Search for the Client

Click on the portion of the client's row to the right of their name, as shown, to access their information.



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On this list of clients, we can already see many details about the client, including the client's program, Medicaid ID number, "As Of" date showing when new information was added, "SOC" showing the start of care date listed, "EOC" for an end of care date (if provided on the authorization), and a list of services authorized.

In Wisconsin, the "Supervisor" column is not active.

Click on the portion of the client's row to the right of their name, as shown by the arrow, to access their full information or make edits.

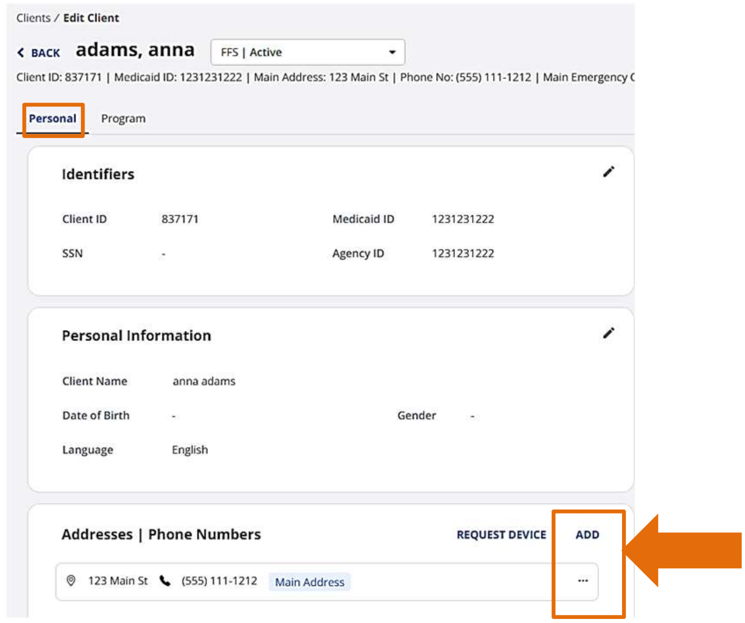
Tip: A client may have more than one line here if they have authorizations with different programs. Modify the information for each line separately. Here, "Adams, John" is an example of a client with more than one authorization.

Add a Valid and Verifiable Address or Phone Number

Add Valid and Verifiable Address or Phone Number

In the **Personal** tab:

- To view or edit the current address or phone number, click on the three dots (…) next to the address.
- To add a new address or phone number, click **Add.**



Search for the client and select the client’s row of information (see slides 11-15).

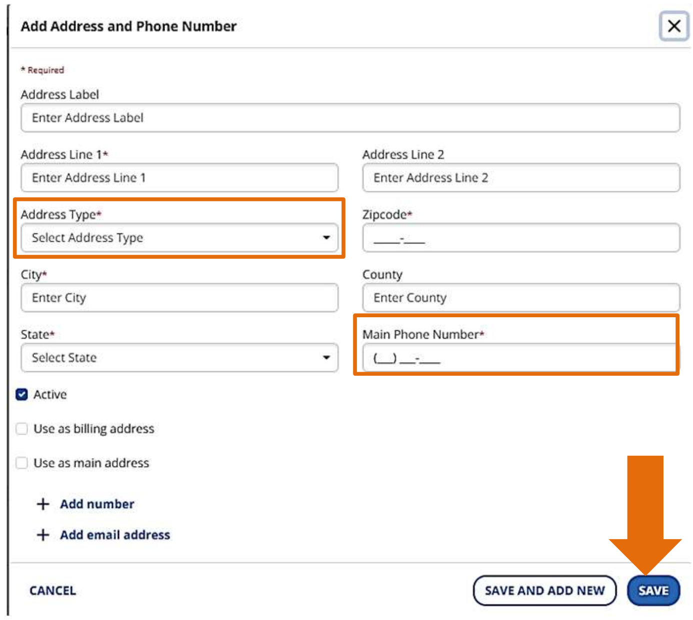
On this screen, the “Personal” tab, you can open up any of the segments by clicking on the pencil icon in the upper right of the segment’s box. Any items that cannot be edited will be grayed out.

To view or edit the current address and phone details you need to click on the three dots to the right of the address line.

To add another address or phone number, in the “Address | Phone Numbers” segment, click “Add.”

Add Valid and Verifiable Address or Phone Number

- Required fields have an asterisk (*).
- For Address Type, use **O- Other** from the drop-down menu.
- If the client doesn't have a landline for **Main Phone Number**, use 555-555-5555.
- Enter other information as needed.
- Click **Save**.



Required fields will have an asterisk (*).

Even if you are only adding a phone number, the address fields need to be filled in on this screen.

An Address Label (the first field) is optional, but it can be helpful--for example, "Mom's house."

Select Address Type O- Other from the drop-down menu. This prevents the new address from being overwritten in the future.

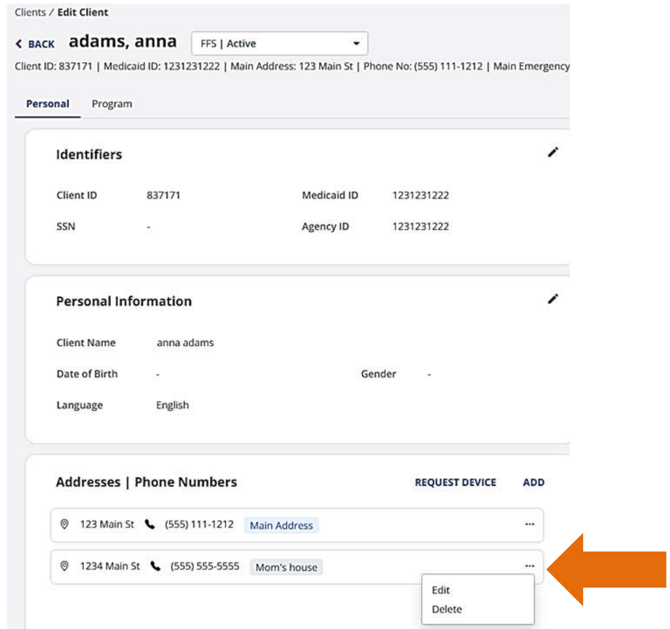
The Main Phone Number is a required field. The phone number must be a landline or fixed Voice over Internet Protocol (VoIP) phone (for example, a phone line from a cable company). If the client doesn't have a landline or VoIP, enter a clearly fake number such as 555-555-5555. A cell phone should not be entered here.

Enter any other information as needed. There is the option to add another phone number and email address for the client.

Click Save.

Add Valid and Verifiable Address or Phone Number

- The new information is now saved.
- To edit or delete the information, click on the three dots to the right and select the action.



The new information is now saved.
To edit or delete the information, click on the three dots to the right and select the action from the drop-down menu.

Change Client Status

Change Client Status

- Search for client.
- Click on the client's row to the right of their name.

CLIENT	STATUS	PROGRAM	SUPERVISOR	MEDICAID ID	CLIENT PAYER ID	AS OF	SOC	EOC	SERVICES
ICAREFCP, NineSevSevNineNine	Pending	WI MCO		2334444312		6/12/23			97799
CAREWI, NineSevOneThreeNine	Pending	WI HMO		2334444318		6/12/23			97139
ICAREBC, NineSevOneThreeNine	Pending	WI HMO		2334444323		6/12/23			97139
ICARESSI, NineSevOneThreeNine	Pending	WI HMO		2334444324		6/12/23			97139
	Pending	WIIRIS-FEA		2334444324		6/27/23			
MERCYCARE, NineSevOneThreeNine	Pending	WI HMO		2334444325		6/12/23			97139
CAREWIFCP, NineSevOneThreeNine	Pending	WI MCO		2334444333		6/12/23			97139

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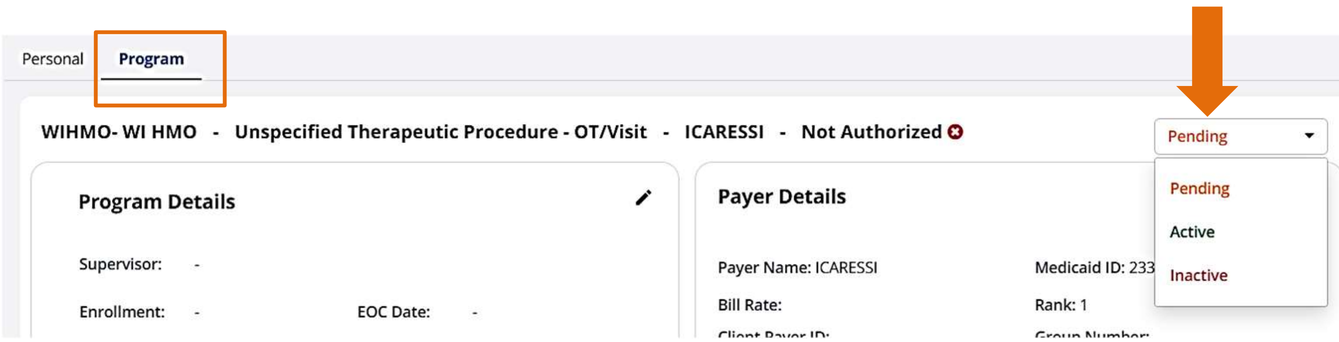
Search for the client you need to edit (see slides 11-15).
Click on the portion of the client's row to the right of their name to access their information.

Tip: A client may have more than one line here if they have authorizations with different programs. Modify the information for each line separately. Here, "ICARESSI" is an example of a client with more than one authorization. In our example, we'll select the row for their WI HMO.

Change Client Status

- Click on the **Program** tab.
- Use the drop-down **Status** menu in the upper right corner.
- Select the desired status.



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Within the client's information:

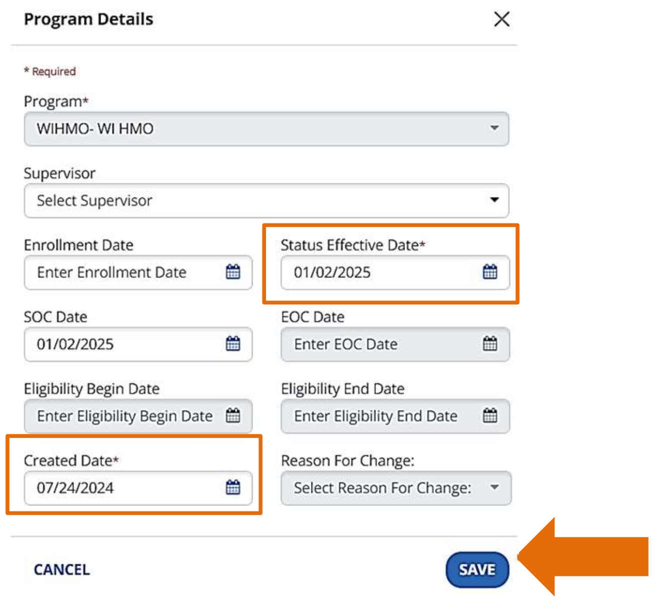
•Click on the Program tab.
•Use the drop-down Status menu in the upper right corner.
    •Clients with an "Active" status will show on Sandata's "Client Management" list and all reports.
    •Clients with "Active" or "Pending" status can be edited in the Sandata EVV portal and can have EVV visits logged by workers.
    •"Inactive" status limits activity on the Sandata EVV portal and does not allow EVV visits to be logged by workers.
•Select the desired status.

Changing to each type of status is covered in the slides that follow.

Change Client Status: Active

To choose **Active** status:

- A pop-up box will require a **Status Effective Date** and **Created Date.**
- Click **Save.**



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If you choose "Active" status:

A pop-up box will require a Status Effective Date (the date when this change is effective). This can be a past, future, or present date, if the Start of Care (SOC) date is the same or earlier. A Created Date is also required. Other fields are optional.

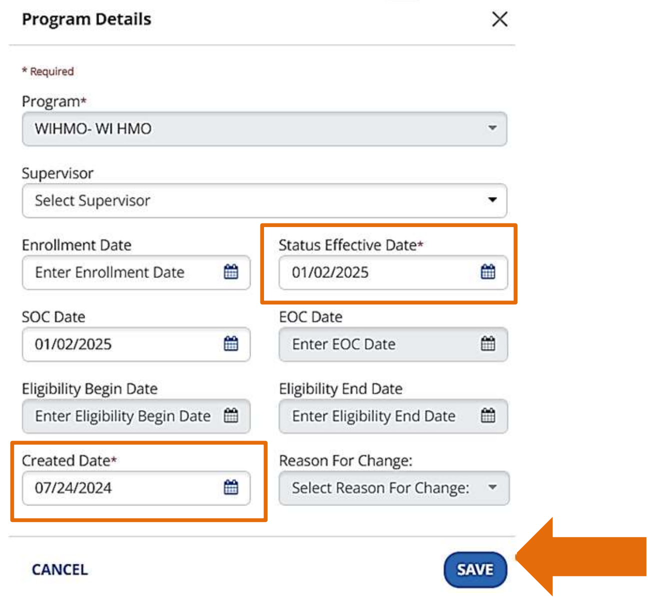
Non-editable fields are grayed out.

Be sure to save the changes**.**

Change Client Status: Pending

To choose **Pending** status:

- A pop-up box will require a **Status Effective Date** and **Created Date**.
- Click **Save.**



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If you choose "Pending" status:

A pop-up box will require a Status Effective Date (when this change is effective). This can be a past, future, or present date, if the Start of Care (SOC) date is the same or earlier. A Created Date is also required. Other fields are optional.

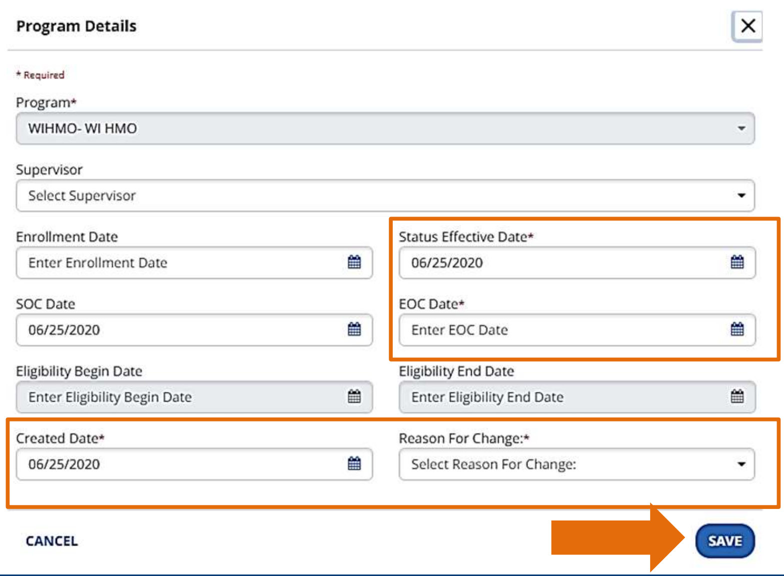
Non-editable fields are grayed out.

Be sure to save the changes.

Change Client Status: Inactive

To choose **Inactive** status:

- A pop-up box will require **Status Effective Date,** End of Care (**EOC**) date, and **Created Date.**
- Select the **Reason for Change** using the drop-down menu.
- Click **Save.**



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If you choose "Inactive" status:

•Fill in the required Status Effective Date (a past, future, or present date —the date this information takes effect), End of Care (EOC) date, and Created Date.

•Grayed out fields cannot be edited. Fields without an asterisk are optional.

•'Reason for Change' is required. Select from the drop-down menu:

- •Member expired
- •Goals met
- •Not eligible
- •Other

•Click Save.

Change Client Status: Inactive

- Clients cannot be deleted from the Sandata EVV portal, only inactivated. Using Inactive status is optional.
- Changing client status does not replace current end-dating authorization processes outside Sandata.
- Fee for service providers should end date the authorization on the ForwardHealth Portal.
- Information entered about clients in Sandata does not update any other system.

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Clients cannot be deleted from the Sandata portal. When a provider no longer provides care to a client, they can change the client status to Inactive. This is optional. This gives the provider the ability to sort or filter for only active clients. Visit cannot be logged for inactive clients.

Changing the client's status to "inactive" gives the provider the ability to sort or filter for only active clients.

However, keep in mind this does not change any current processes for ending an authorization. Fee-for-Service providers, if you are no longer providing care you should end date the authorization on the ForwardHealth Portal, especially if another provider is taking over care.

Remember, the information entered about clients in Sandata does not flow backwards to DHS or any other entities. It only stays in Sandata.

Change Start of Care Date

Let's review how to change a client's start of care date. Providers may need to edit the start of care date to match the authorization.

The start of care date is auto populated as the date the client is added to the Sandata EVV portal. That may not match the first EVV visit date allowed. As always, providers should pay close attention to the payer-approved authorization start dates. Services should not begin prior to the date approved in the authorization.

Change Client Status

- Search for client.
- Click on the client’s row to the right of their name.

CLIENT	STATUS	PROGRAM	SUPERVISOR	MEDICAID ID	CLIENT PAYER ID	AS OF	SOC	EOC	SERVICES
⊕ ICAREFCP, NineSevSevNineNine	Pending	WI MCO		2334444312		6/12/23			97799
⊕ CAREWI, NineSevOneThreeNine	Pending	WI HMO		2334444318		6/12/23			97139
⊕ ICAREBC, NineSevOneThreeNine	Pending	WI HMO		2334444323		6/12/23			97139
⊕ ICARESSI, NineSevOneThreeNine	Pending	WI HMO		2334444324		6/12/23			97139
	Pending	WIIRIS-FEA		2334444324		6/27/23			
⊕ MERCYCARE, NineSevOneThreeNine	Pending	WI HMO		2334444325		6/12/23			97139
⊕ CAREWIFCP, NineSevOneThreeNine	Pending	WI MCO		2334444333		6/12/23			97139

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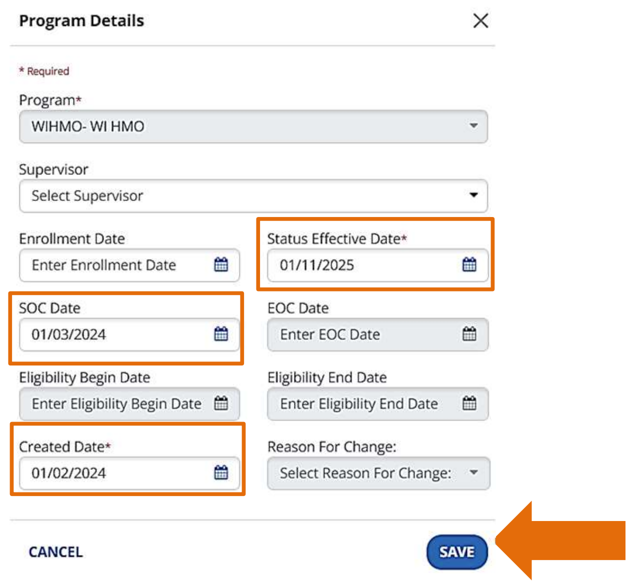
Search for the client you need to edit (see slides 11-15).
Click on the portion of the client’s row to the right of their name to access their information.

Tip: A client may have more than one line here if they have authorizations with different programs. Modify the information for each line separately. Here, “ICARESSI” is an example of a client with more than one authorization. In our example, we’ll select the row for their WI HMO.

Change Start of Care Date

- In the **Program** tab, click the pencil icon to edit **Program Details**.
- A pop-up box will require a **Status Effective Date**.
- The Start of Care (**SOC**) date can be edited.
- The **Created Date** can be edited, if needed. It should be before or the same as the SOC.
- Click **Save**.



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Providers may need to change the start of care date to match first EVV visit. This is only needed if the first visit was authorized to occur before the client was loaded to Sandata.

To change the start of care (SOC) date, the client's status must be Active.

In the pop-up box:
Enter the Status Effective Date. This can be a past, future, or present date. It cannot be before the SOC or Created Dates.
Edit the Start of Care (SOC) date field and enter the date care stated, as allowed by the authorization.
The Created Date was automatically entered as the date the authorization loaded to the Sandata EVV portal. This can be edited to be before or match the SOC date.

Non-editable fields are grayed out.

Be sure to save the changes.

Resources

Resources

- EVV Customer Care
  - Phone: 833-931-2035, Monday–Friday, 7 a.m.–6 p.m. CT
  - Email: VDXC.ContactEVV@wisconsin.gov
- EVV **Training Administrators** webpage
  www.dhs.wisconsin.gov/evv/training-administrators.htm

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Our customer service team is specially trained for EVV and only take EVV calls.

Our EVV Customer Care can be reached at 833-931-2035, Monday–Friday, 7 a.m.–6 p.m. or by sending an email to VDXC.ContactEVV@wisconsin.gov

Thank You

Thank you for the important services you provide to members.

WISCONSIN DEPARTMENT of HEALTH SERVICES