Electronic Visit Verification: Visit Maintenance

WISCONSIN DEPARTMENT of HEALTH SERVICES

P-02754 (01/2025)

Objectives

- Understand how electronic visit verification (EVV) data is sent to payers.
- Use the Sandata EVV portal dashboard to monitor the current day's visit exceptions.
- Search, review, and resolve visit exceptions.
- Prevent visit exceptions.

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Key Terminology

- Call—A check in or out of a visit using *any* EVV method
- Client—A person who receives services through the Medicaid program
- Dashboard—Real-time status of the current day's visit exceptions
- Employee—A person who provides care to one or more clients (worker)
- Exception —Missing information or errors in the Sandata EVV portal

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First, let's start by talking about common terms.

•Call—A check in or out of a visit through *any* EVV method. This could be done through the app, telephonic visit verification, fixed visit verification, or even a manual entry in the Sandata EVV portal.
•Client—A person who receives services through the Medicaid program. A "client" in the Sandata EVV system is frequently called a "member" or "participant" in Wisconsin's service delivery.
•Dashboard—Real-time status of the current day's visit exceptions
•Employee—A person who provides care to one or more clients (worker)
•Exception —Missing information or errors in the Sandata EVV portal

Key Terminology

- FVV—Fixed visit verification
- Sandata EVV portal—Administrative tool for reviewing and editing worker visits
- Santrax ID—The employee/worker ID number, originating on the ForwardHealth Portal, that identifies them in Sandata.
- SMC—Sandata Mobile Connect app
- TVV—Telephonic visit verification
- Visit—An in-person service to a client in a home or community-based setting

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•FVV—Fixed visit verification
•Sandata EVV portal—Administrative tool for reviewing and editing worker visits. This is done on a tablet, laptop, or desktop computer.
•Santrax ID—The employee/worker ID number that originates on the ForwardHealth Portal. Employees use this number to identify themselves when using Sandata's TVV and FVV.
•SMC—Sandata Mobile Connect app, used by workers on a smartphone or tablet
•TVV—Telephonic visit verification
•Visit—An in-person service to a client in a home or community-based setting

EVV Visit Lifecycle

EVV Visit Lifecycle

Authorization

Payer authorizations are submitted to the Wisconsin Department of Health Services (DHS). DHS sends all authorizations for services requiring EVV to Sandata nightly.

Visit

A worker uses EVV technology to check in and check out of an authorized visit. Six key data points are captured to create EVV visit data.

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

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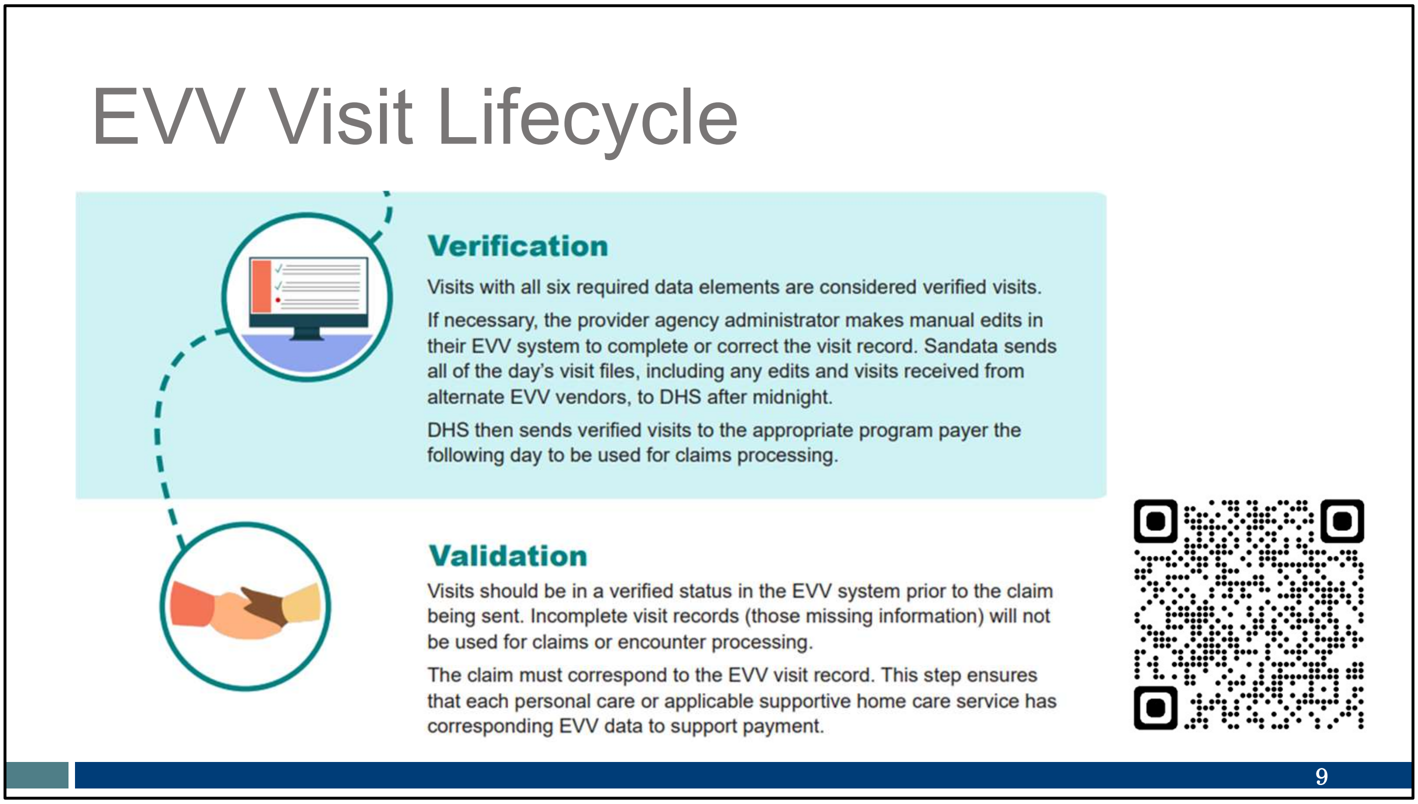
How does EVV information successfully travel from the visit to the payer? Understanding this path will help you understand challenges along the way. The flyer linked here is worth referring to as your understanding of EVV matures. The QR code will take you to it: Open your cell phone camera and hover it over the QR box. A text box will pop up. Tap on the text box and it will take you to the flyer.

The first step is having an authorization on file. DHS sends all authorizations for services requiring EVV to Sandata each night. The authorization sets up a foundation for the rest of the steps. It confirms the correct services are provided to the correct client, by the correct provider agency (and their employee), within the timeframe outlined.

A side note: In Wisconsin, certain services are allowed by policy without an authorization. In these situations, the required authorization information can be created by the provider (remember, this includes independent nurses) in the Sandata EVV portal. Again, the purpose is to establish that foundation.

Next is the visit. Employees use EVV technology to check in and check out of a visit. The information gathered should reflect to the authorization: the correct services, provided to the correct client, by the correct provider (and their employee), within the timeframe outlined.

Invest in training employees! An employee who knows how to use EVV during the visit is an important part of this path and will make the rest much easier. Let’s go to the next slide.



The visit information automatically flows into the Sandata EVV portal, where an administrator views it. If there is missing or inaccurate authorization information, this will need attention. If the employee entered the wrong information or the visit is missing information, this will need correcting. This administrative work is call verification and is the step you see on the top of the slide.

Most of the remainder of this presentation will look at verification--those information gaps and how to close them. Why is it important? Because of the final step.

That last 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 supports the claim. 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 any claim submitted later cannot be validated. The claim cannot be paid.

Bottom line: By verifying visits, you are helping ensure claims are validated and your agency gets paid.

EVV Visit Lifecycle

For providers, EVV does not change:

- The process of how claims are submitted.
- Documentation retention requirements.
- The need for physician orders, a plan of care, or other required documentation.
- Timely filing requirements with payers.

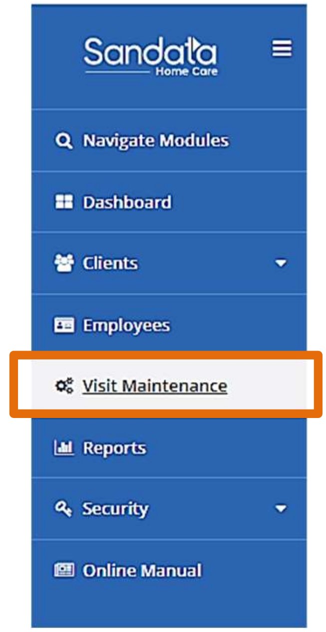
A few reminders; for providers, EVV does not change:
•EVV does not change the process of how claims are submitted. Claims are done the same as usual, outside EVV.
•EVV does not change documentation retention requirements.
•EVV does not change the need for physician orders, a plan of care, or other required documentation.
•EVV does not change timely filing requirements with payers. Although the Sandata EVV portal allows edits to visit data 365 days from the date of service, a payers' requirements for timely claims may be less time. Be sure you understand your payers’ requirements.

Visit Maintenance Basics

Visit Maintenance

Visit Maintenance is the Sandata EVV portal module where visits are:

- Viewed in near real-time.
- Verified that all required data elements have been captured.
- Corrected and cleared of exceptions (errors).
- Confirmed to be in a "verified" status prior to submitting claims.



Visit Maintenance

- It is important to verify visits in a timely manner so the visit is automatically sent to DHS and payers for claims/encounter processing.
- More than one exception can apply to a single visit.
- Fixing one issue within visit maintenance may also fix several other exceptions.
- A provider administrator with visit maintenance security privileges can correct and add information.

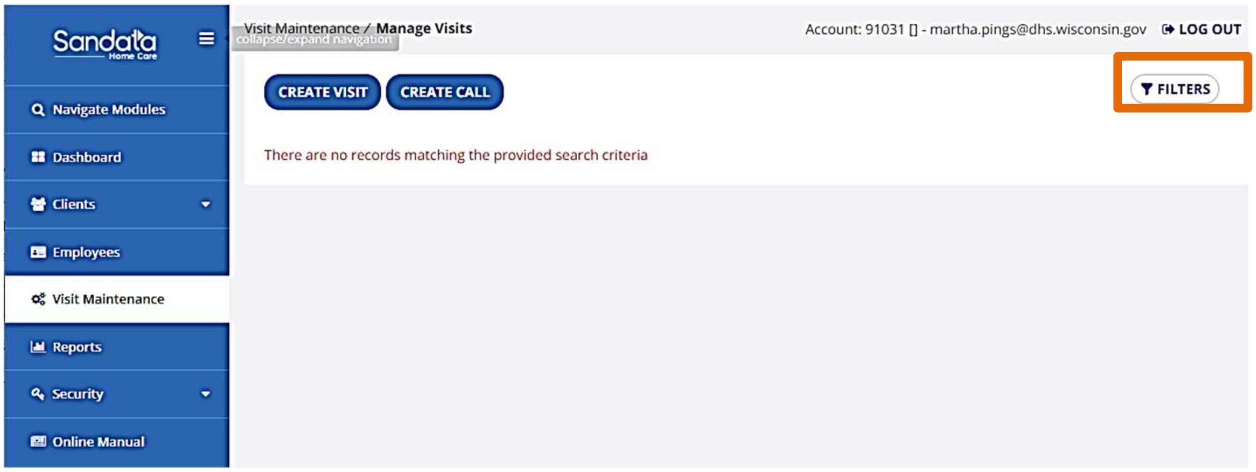
Here are some basic ideas to start:
Verify visits in a timely manner, so you can submit claims in a timely manner. Get visits verified before the claim is sent.
A visit can have several exceptions. Sometimes they are related and can be easily fixed.
The system defined roles that can edit visits in visit maintenance are:

- System Admin
- Coordinator

See the security training for more information about assigning roles and privileges.

Search Filters

Use the “Filters” option to view visits.

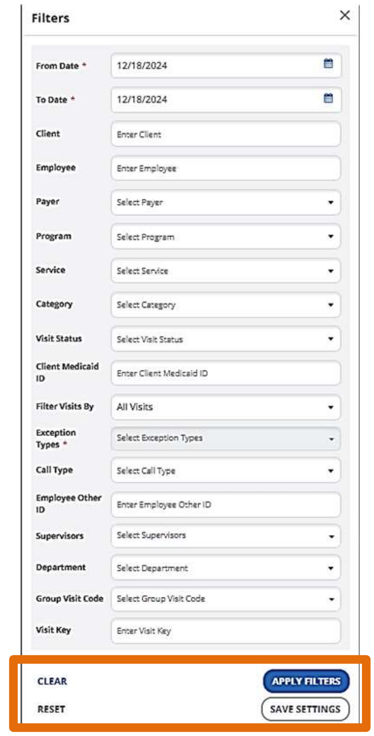


When you first click on Visit Maintenance, you will see three options across the top: Create Visit, Create Call, and Filters. It’s best to start with Filters, so you can define the list of visits you’d like to see. The current default is all visits for today.

Search Filters

Within the filter, select the information needed.

- Click the dates to view any range. The current date will populate by default.
- Click **Clear** to start over.
- Click **Save Settings** to set up new default settings.
- Click **Apply Filters** when you are ready to view.



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

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

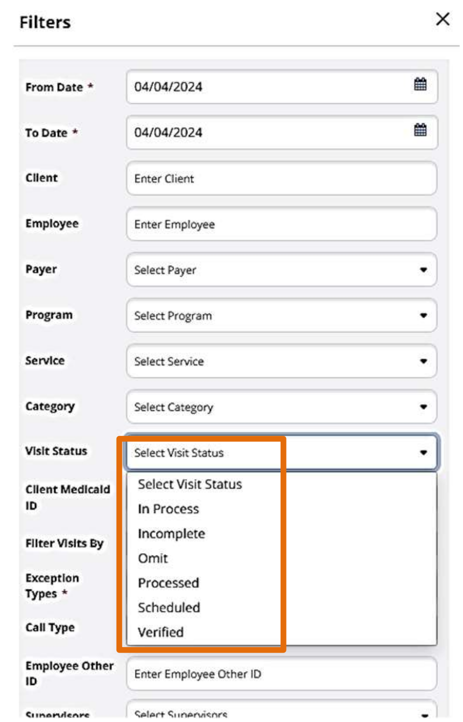
You can enter portions of a name if you are not sure of a spelling (for example, "Kell" if you are not sure if it's Kelly or Kelley).

If you'd like particular filter settings to always show, use the "Save Settings" button at the bottom right. "Reset" will clear any filter choices done after your saved settings. "Clear" will clear all filter choices, including any saved settings.

Search Filters

The Visit Status field allows a user to filter visits by their status:

- **In Process**—Visits that have started and are not yet completed
- **Incomplete**—Visits missing key information (for example, check in or check out)



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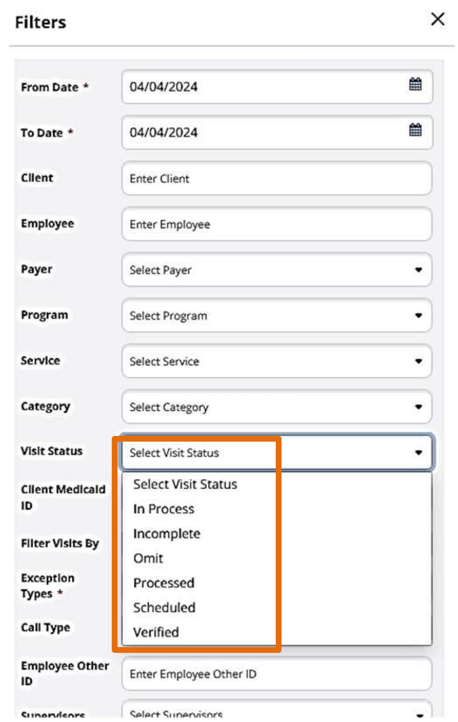
You can search for visits based on their "Visit Status." You can select from these choices:

"In process" is when a visit check-in is captured and there has been no check out yet. The employee may still be with the client, in process of the visit. You may want to see if a check-in went well.

"Incomplete" can occur for many reasons. The visit could be missing check in or check out, or have missing or incorrect client information, or have an incorrect employee Santrax number. These are the visits that will require your attention.

Search Filters

- **Omit** —Visit record to be ignored
- **Verified**—Visits that do not contain any exceptions



"Omit" status is rather unique. Visits cannot be deleted from the Sandata EVV portal. Instead, providers can assign the Omit status when a visit is captured in error. Omit status can help filter out these records so that the administrators aren't looking to edit these accidental visit records.

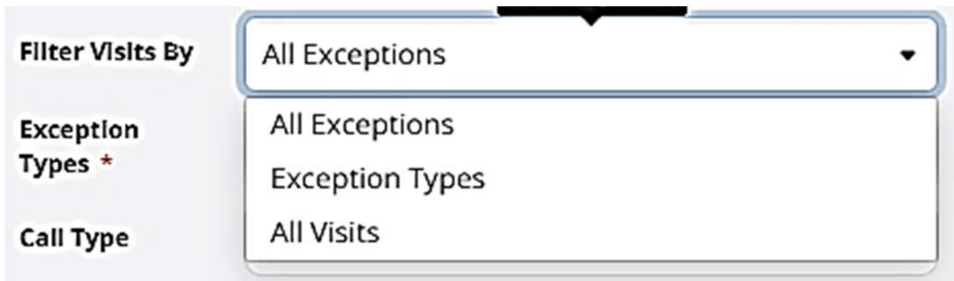
"Verified" will show all the visits that have all the data and require no further action.

"Processed" and "Scheduled" are not used for Wisconsin.

Search Filters

Use the **Filter Visits By** field to choose to filter visits by:

- All Exceptions
- Exception Types
- All Visits



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

Important tip: Always check to make sure this field shows what you want. By default, this filter is set to "All Visits**."**
Let's go through the results when each of these is chosen.

Search Filters

Filter Visits by All Visits

- All visits are displayed within the dates selected.
- Status results include verified, in process, omit, and incomplete.

Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	VISIT STATUS	DO NOT BILL	APPROVED	ACTIONS
Adams, John	PEMA, SHERPA	Personal Care Svc/15min	03/25/2024	12:36 PM	12:53 PM	00:17	12:36 PM	12:53 PM		Incomplete			
Itzen, Sheila	PEMA, SHERPA	Private Duty Nursing - RN/Hour	03/25/2024	12:57 PM			12:57 PM			Incomplete			
(516)484-4400			03/08/2024	05:50 AM			05:50 AM			Incomplete			
TEST, VOID	Caregiver, Sheila		02/26/2024	10:00 AM	01:00 PM	03:00	10:00 AM	01:00 PM		Incomplete			
						Total: 03:17							

25 of 4 entries

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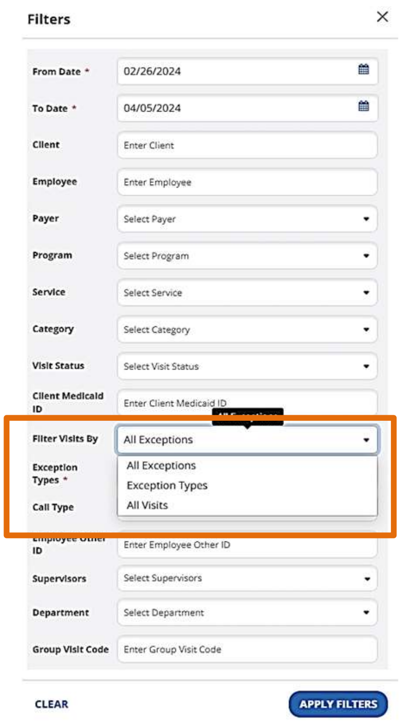
If you filter visits by All Visits, you will see a list of visits like this. Each row is a different visit. You can see the information that is summarized across each row.

•All visits are displayed within the dates selected.
•You'll see visits that are successful and ones that need attention.

Search Filters

Filter Visits by All Exceptions

Visits are displayed containing one or more exceptions within the specified date range.



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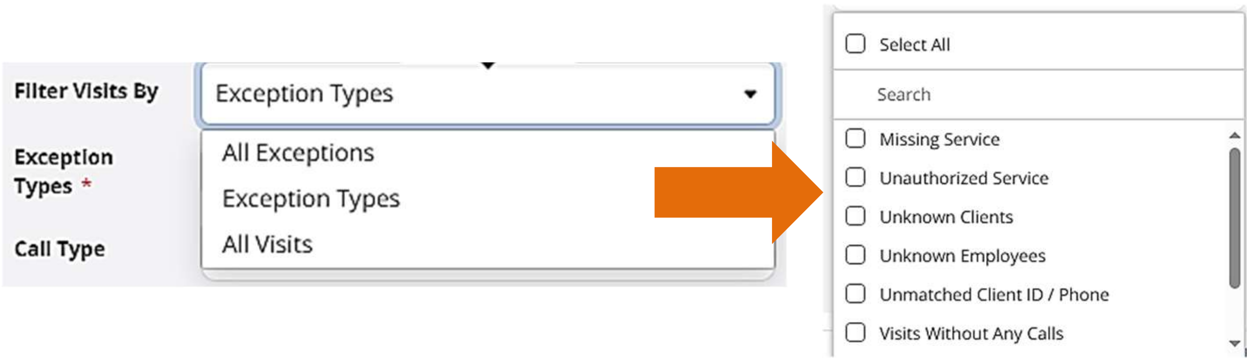
If you filter visits by All Exceptions
•Visits are displayed containing one or more exception (errors) within the specified date range.

TIP: Using an "All Exceptions" filter is a good way to see what visits have exceptions that need to be fixed.

Search Filters

Filter Visits by Exception Types

When selected, an additional field appears. Choose the specific exception type(s) from a drop-down menu.



What if you filter visits by Exception Types?
•When selected, an additional field appears. Choose the specific exception type(s) from a drop-down menu.

This is a great tool to view and work on visits with the same exception types.

Search Filters

The search results include all data that matches the filters.

Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	VISIT STATUS	DO NOT BILL	APPROVED	ACTIONS
Adams, John	PEMA, SHERPA	Personal Care Svc/15min	03/25/2024	12:36 PM	12:53 PM	00:17	12:36 PM	12:53 PM		Incomplete	☐		
Itzen, Sheila	PEMA, SHERPA	Private Duty Nursing - RN/Hour	03/25/2024	12:57 PM			12:57 PM			Incomplete	☐		
(516)484-4400			03/08/2024	05:50 AM			05:50 AM			Incomplete	☐		
						Total: 00:17							

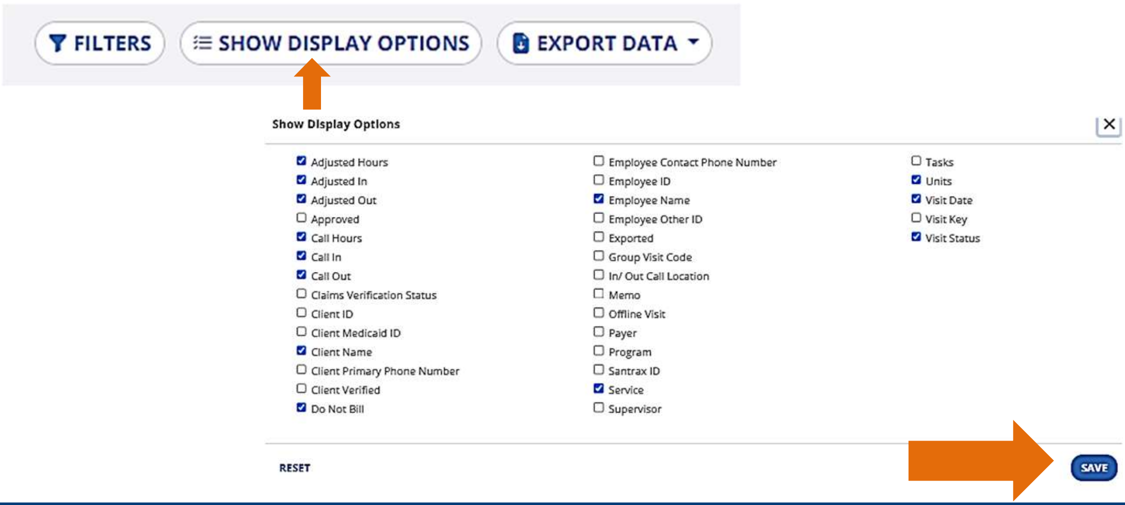
25 of 3 entries

« < 1 > »

Once you've applied the filters you want, you will see a list of visits like this. Each row is a different visit. You can see the information that is summarized across each row.

Display Options

To change what information is shown, click **Show Display Options**.



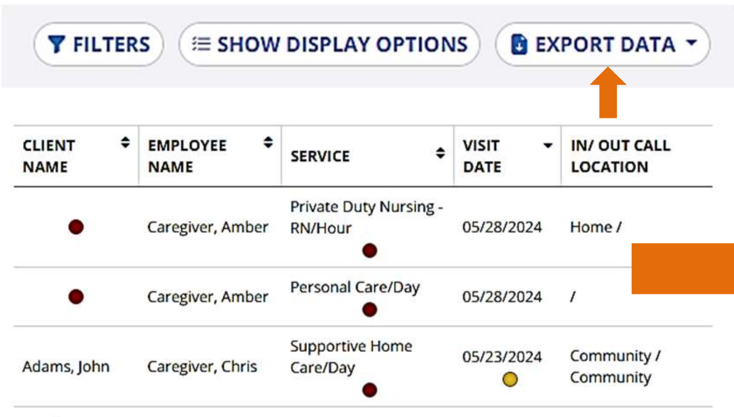
Once you have the list of visits you want to view, you can also change what information about each visit will show in the columns.

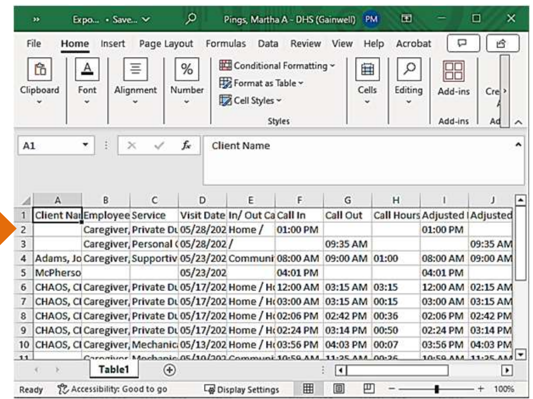
To change the display options, select Show Display Options. Check the information you want and click Save.

As a reminder, the DHS-provided Sandata system does not include billing and claims processing. Selecting those items from this list will not give information in those fields.

Display Options

To export information, click **Export Data**.



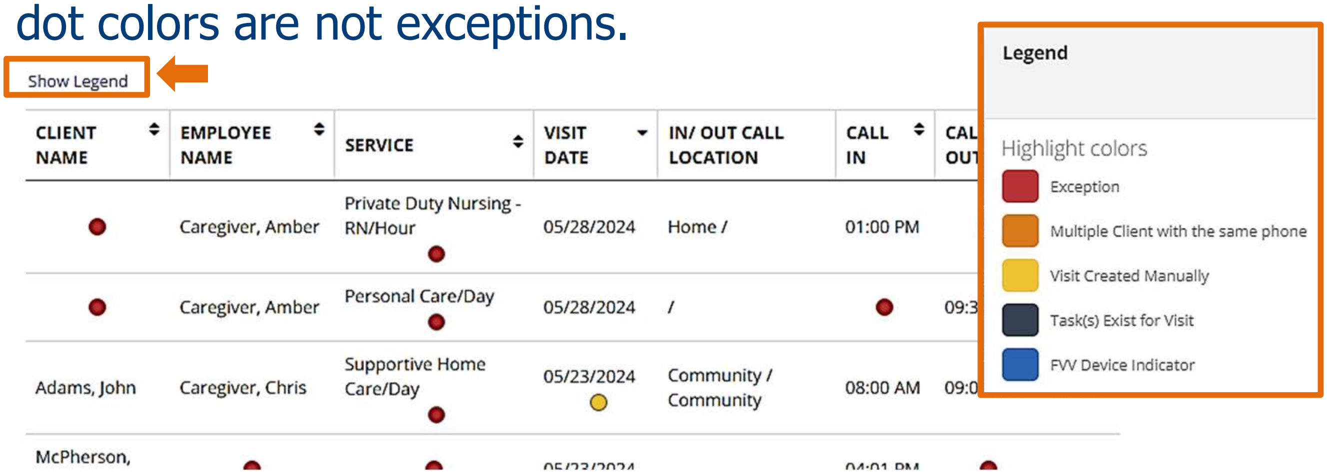


Did you find visit information you'd like to share with others on your team, or information you want to sort and summarize? Select Export Data and choose either a CSV or Excel file. An Excel example is shown here.

This feature is in addition to the ready-to-run reports that are available in the Sandata EVV portal. (See the Reports training items for more information on Sandata's reports.)

Identifying Exceptions

Visit exceptions are indicated by a red or orange dot. Other dot colors are not exceptions.



Let's take a closer look at the list of visits. Each row is a different visit.

Visit exceptions are indicated by a red dot. It will appear in the column where the exception exists. A visit may have one or more exceptions. In our top row example, there are three exceptions:

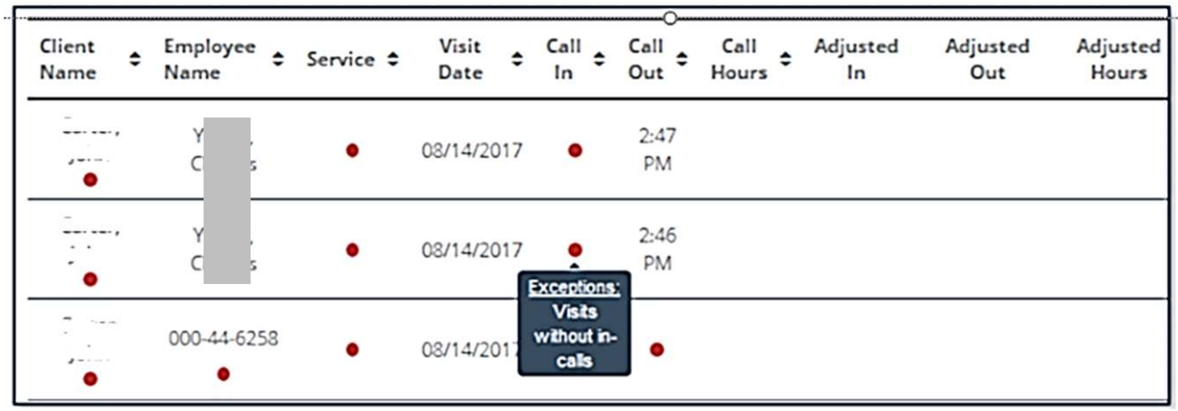
- Client name
- Service unauthorized or missing
- Missing call in/call out

For information about what each color means, you can select "Show Legend" in the upper left corner.

Our example has one yellow dot, showing that this visit was created manually on the Sandata EVV portal. This is for awareness only—it is not an "exception." Only red and orange dots are exceptions that need attention.

Identifying Exceptions

Hovering over a dot displays a pop-up with a description of the exception(s).



Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours
[illegible] ●	[illegible]	●	08/14/2017	●	2:47 PM				
[illegible] ●	[illegible]	●	08/14/2017	●	2:46 PM				
[illegible] ●	000-44-6258 ●	●	08/14/201[illegible]		●				

Identifying Exceptions

Visit exceptions must be fixed or acknowledged:

- Fix—The information must be corrected or added for the visit to be considered complete.
- Acknowledge—The missing information must be acknowledged to be considered complete.

When an exception occurs, a provider administrator will need to do one of these actions:

"Fix" means to add missing data or change incorrect data. This will clear the exception and get the visit into a verified status.

In some cases, the administrator must "acknowledge" that the exception occurred, as the missing or incorrect information can only be collected at the time of the visit.

Either action will clear the exception for that visit. Let's take a look at some examples.

Identifying Exceptions

Exception Setting	Description	Setting
Unknown Client (red dot)	A visit occurs where the client is not known to the Sandata system.	Fix
Unknown Employee (red dot)	The employee Santrax ID entered during a TVV or FVV call does not match to any known employee.	Fix
Unmatched Client Phone/ID (orange dot)	A client ID is entered during a TVV call, but the phone number the call was made from is not a number listed for the client.	Acknowledge

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Here are the exceptions that may show up in your Sandata EVV portal.

- Unknown Client can occur when the Client ID entered does not match to an existing client. Maybe the client ID was entered wrong. It can also happen when the app is offline and the employee didn't fill in the client name or ID on the app screen. This can be fixed by entering in the client's name.
- Unknown employee may happen if an employee types their ID in wrong. This can be fixed by entering in the employee.
- Unmatched Client Phone/ID can occur when the phone number used to call in a TVV visit does not match to a known client. This can be acknowledged—there's no way to go back in time to "fix" what phone number was used. Acknowledging it will remove the exception and be considered corrected.

Identifying Exceptions

Exception Setting	Description	Setting
Missing Service (red dot)	The service provided for the visit is not specified.	Fix
Visits Without In-Calls (red dot)	The visit does not have a call in. Check for visit to merge.	Fix
Visits Without Out-Calls (red dot)	The visit does not have a call out. Check for visit to merge.	Fix

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Missing service can happen if a service code wasn't entered at the time of the visit. A service code can be entered.

Missing in or out calls can sometimes be fixed with entering the in or out call, and sometimes by merging calls. Merging visits will be talked about in more detail later.

Identifying Exceptions

Exception Setting	Description	Setting
Unauthorized Service (red dot)	The service entered during the check in or check out does not match the service shown in the authorization information, or there is no current authorization on file.	Fix

NOTE: GPS location is informational only and is not an exception.

Unauthorized service happens when the service entered doesn't match the authorization information that's on file in Sandata., or there is no current authorization on file.

NOTE: GPS location will be flagged within visit information on the Sandata EVV portal only 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, GPS is listed apart from the chart above. DHS does not currently use GPS data to deny claims. Data may be used for compliance review by the Office of the Inspector General.

Basic Steps: Exceptions

Select the exception dot.

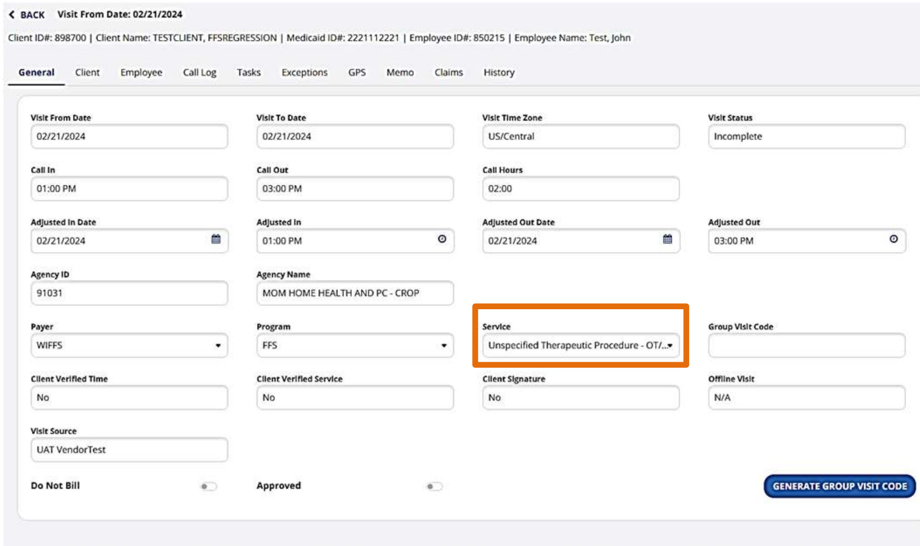
CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	CA HC
TESTCLIENT, FFSREGRESSION	Test, John	Unspecified Therapeutic Procedure - OT/Visit	02/21/2024	01:00 PM	03:00 PM	02:

Whether you are "fixing" or "acknowledging," and no matter what your reason for needing to make a correction, here's the general way you will take care of all exceptions: SELECT and CORRECT.

From the list of visits in Visit Maintenance, SELECT an exception dot by clicking on it. In this example, the service provided shows an exception, so we'll click on that red dot. (Remember, the yellow dot means it was manually entered. That does not need correction.)

Basic Steps: Exceptions

Enter the corrections.



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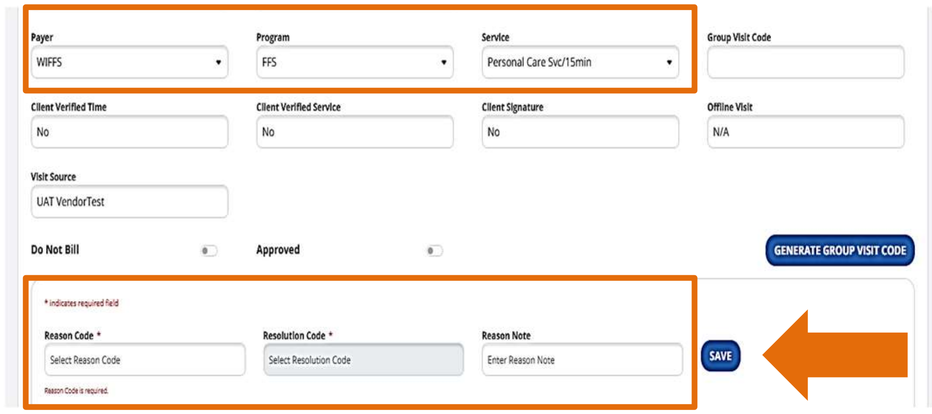
A new screen will open with the full details of the visit

CORRECT: Enter in the corrections. Since “Service” had the exception dot, we’ll look at the “Service” field here and correct it using the drop-down menu.

Basic Steps: Exceptions

Enter the **Reason Code** and **Resolution Code**. **Save**.



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In this example, we changed the service from Unspecified Therapeutic Procedure to Personal Care Svc/15 min, and made sure the program and payer fields were also correct on the top line.

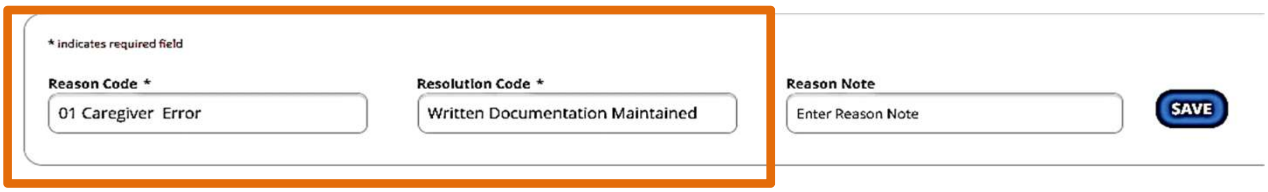
Finally, enter in the required fields at the bottom, Reason Code and Resolution Code.

Save.

We'll see these "Select and Correct" steps over and over in the slides to come. Once you know the pattern you can get a rhythm going.

Reason Codes

- Reason codes appear when making any visit changes in the Sandata EVV portal.
- Documentation should support the need for the change. This may be documentation the provider currently has on file.



The Reason Code field will show whenever you make visit changes in the Sandata EVV portal. There is a drop-down menu to choose from that we'll review in just a bit. There's also a Reason Note field that is available, but in this case not required (it doesn't have an asterisk next to it).

The Resolution Code is a drop-down menu as well, with "Written documentation" as the only option. The Centers for Medicare & Medicaid Services (CMS) requires documentation for all changes to a visit. However, CMS has not defined the documentation requirements. Providers must maintain documentation that is evidence of why the changes are made. This could be the medical records, timesheets, or authorizations (wherever the providers maintain the evidence for what they are billing. Make sure you have this documentation.

For example, if a visit was logged from 2-4 p.m. and a manual change was done to make it Noon-4 p.m., documentation would be required to show the visit was indeed four hours.

Please be aware: Visits that are modified may be reviewed by the Office of the Inspector General as they weren't fully electronically captured at the time of service.

Reason Codes

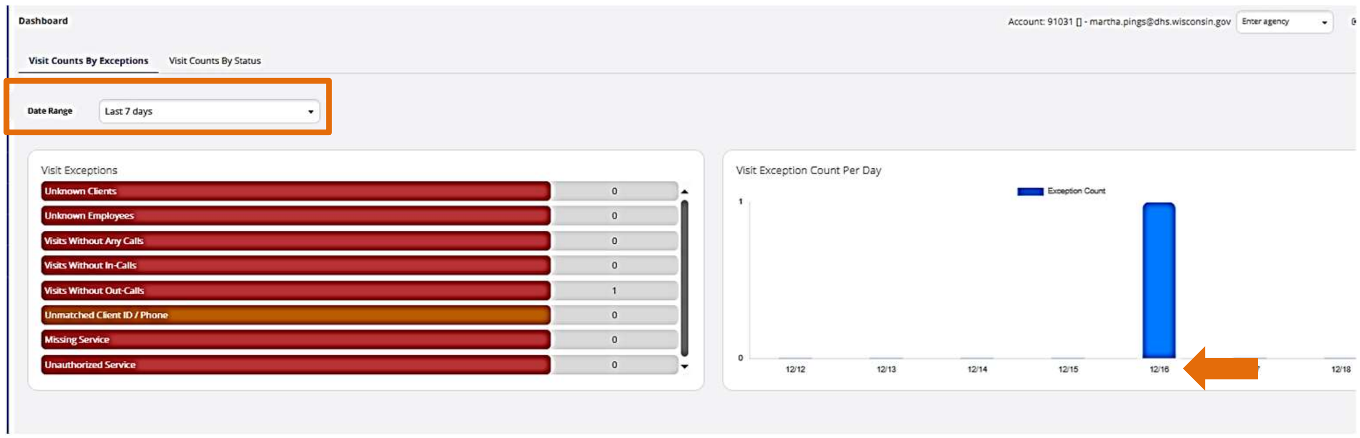
Reason Code	Reason Note Required within the Sandata EVV Portal
Caregiver Error	No
Client Unavailable	No
Mobile Device Issue	No
Telephony Issue	No
Client Refused Verification	Yes
Service Outside the Home	No
Missing in System	No
Other	Yes

The table here shows the list of drop-down reason codes.

As you see here, most don't require any extra notes within the Sandata EVV portal. When a note is required, that field will be available to type it in. This becomes part of your documentation, in addition to items outside EVV.

Sandata EVV Portal Dashboard

Sandata EVV Portal Dashboard



The Sandata EVV portal dashboard is the first screen that appears when a user logs in. This is a real-time "today only" snapshot. However, it can be changed to a date range to the last 7 days using the drop-down arrow shown here.

All the different types of exceptions are noted on the dashboard. These will also appear in visit maintenance lists, of course, but this quick view can help providers quickly identify how many exceptions occurred within one day or up to a seven-day range. You can see trends and start to problem solve to prevent future exceptions right away.

In our example here, we have the last 7 days' view. The chart on the right shows one exception on 12/16.

Sandata EVV Portal Dashboard

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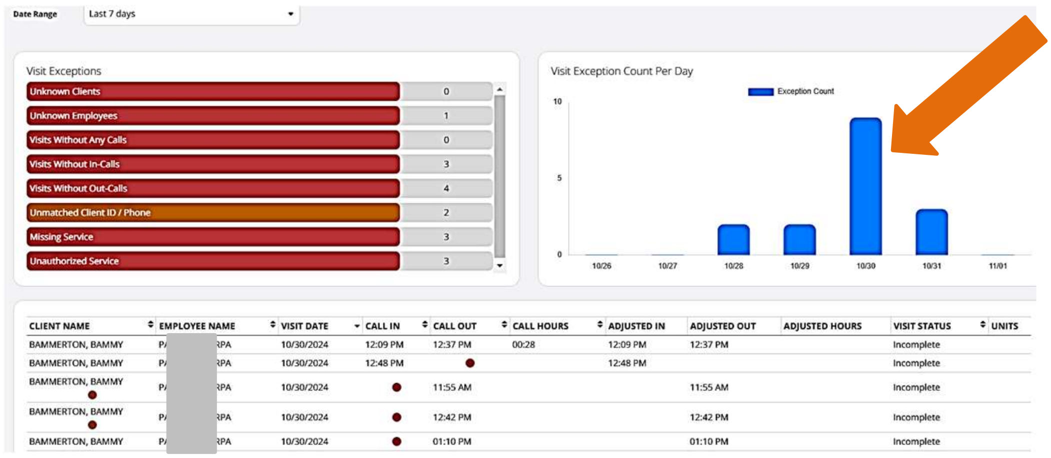
You can also choose the Visit Counts By Status tab at the top. After you choose a date range within the calendar month, the blue Visit Status bar will show how many visits are in each status. Click on a blue bar on the left, and you'll see a date summary on the right side of the screen. Here we've chosen the Visit Status of "Incomplete," and can see one visit from May 12 and four visits from May 16 are incomplete.

This is another way to quickly see trends.

Sandata EVV Portal Dashboard

Clicking a blue bar in the Visit Exception Count Per Day chart allows the user to view visits with exceptions on that day.



Click a blue bar in the Visit Exception Count Per Day chart. It will list the visits with exceptions for that day, as shown on the bottom part of this screenshot.

Let's explore how to edit each of those exception types next.

Correcting Unknown Client Exceptions

Unknown Client Exception

This exception happens when the client is not able to be identified in the system. This can occur when:

- An SMC visit is started as an unknown visit (offline) without the client information entered.
- The authorization is not on file with Sandata.
- The employee typed in a wrong client ID.
- The employee checked-in/checked-out from an unrecognized phone number.

“Unknown client" means the system was unable to confirm the client. The client is "known" to the provider, of course.

Tip: This is a good exception to start with. Sometimes, once the client’s name is entered, other exceptions for that visit will automatically clear.

Here are some reasons this exception can occur:

- A employee may start an offline SMC visit as an “Unknown Visit” but did not enter the client’s name and Sandata ID.
- The authorization may not be on file with Sandata. How can this happen?
    - There are some situations where an authorization is not needed by policy. To get the information loaded to the Sandata system, providers will need to enter it. This is covered separately in the “Adding required authorization information” presentation.
    - Sometimes, care needs to start before the authorization is set up. When the authorization arrives, these exceptions should clear.
    - Sometimes, the payer is delayed in sending the authorization. If an approved authorization is not loaded to Sandata in 3 days, contact EVV Customer Service. They can help trace the authorization.
- The employee typed in a wrong client ID.
- The employee checked-in/checked-out from an unrecognized phone

number.

Unknown Client Exception

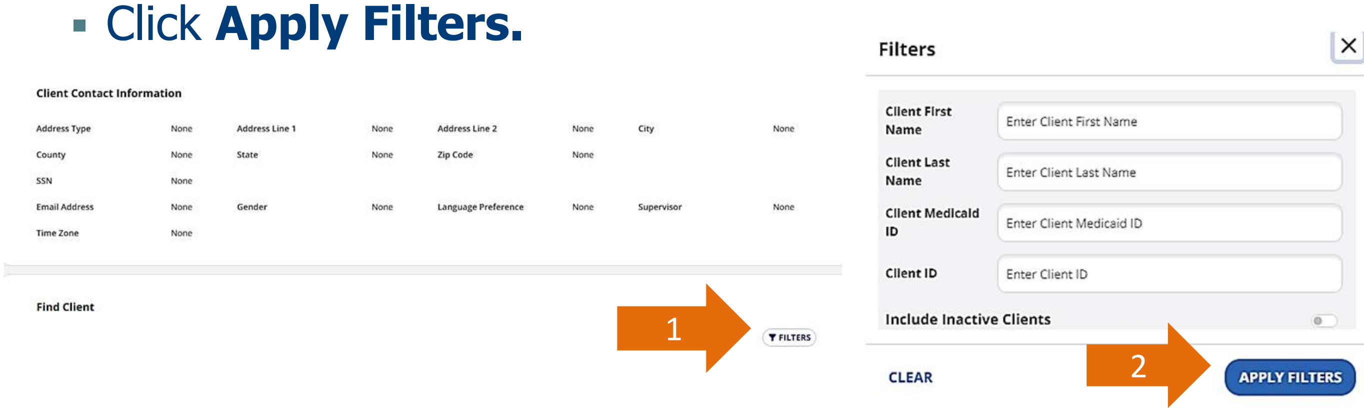
Click the exception dot under the Client Name column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In
●	Caregiver, Sheila	Supportive Home Care/Day ●	05/14/2024	01:50 PM	●		01:50 PM

As usual when making corrections, start by clicking on the red or orange dot—the exception indicator. When you hover over it, it should say, "unknown client." Select it.

Unknown Client Exception

- Click **Filters.**
- Add details to narrow the search.
- Click **Apply Filters.**

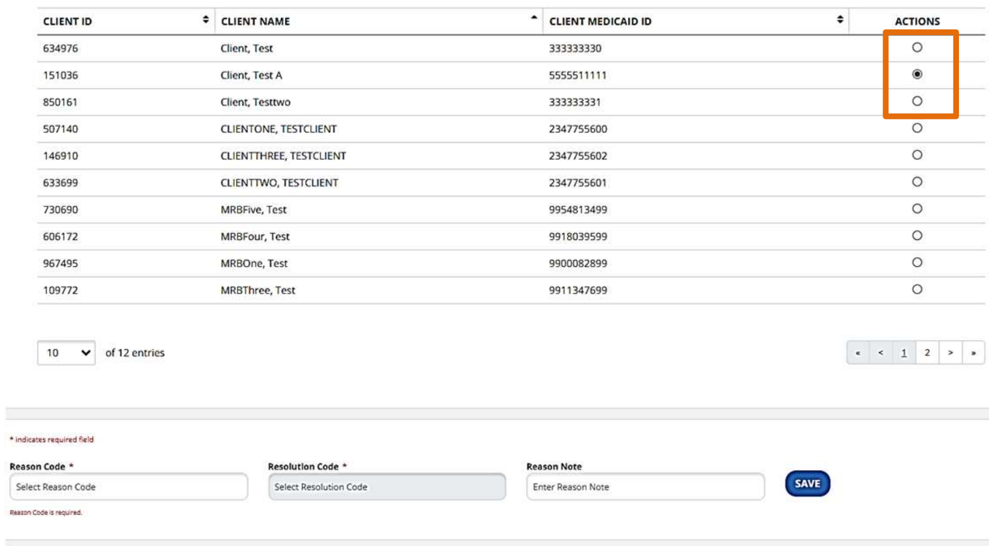


A new screen will open with the full details of the visit. In this case, it brings you to the area that allows you to add the client.

First, in the find Client section, click Filters (see the #1 arrow), to open the Filter options. Then add data to help narrow your search and click Apply Filters.

Unknown Client Exception

Click the action button for the correct client.

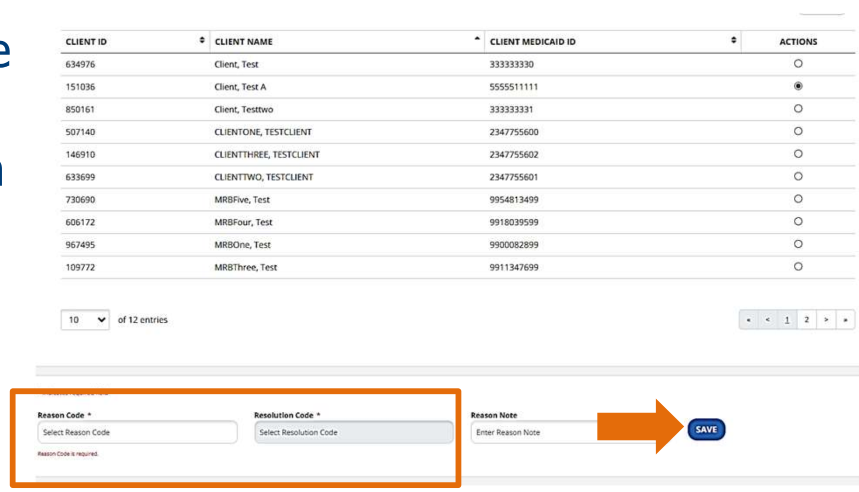


CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	ACTIONS
634976	Client, Test	333333330	○
151036	Client, Test A	5555511111	◉
850161	Client, Testtwo	333333331	○
507140	CLIENTONE, TESTCLIENT	2347755600	○
146910	CLIENTTHREE, TESTCLIENT	2347755602	○
633699	CLIENTTWO, TESTCLIENT	2347755601	○
730690	MRBFive, Test	9954813499	○
606172	MRBFour, Test	9918039599	○
967495	MRBOne, Test	9900082899	○
109772	MRBThree, Test	9911347699	○

Select the correct client by clicking the action button on their row.

Unknown Client Exception

- Select a reason code from the list.
- Select the resolution code, Written Documentation Maintained.
- Click **Save.**



As we've seen before, an edit will bring these extra fields:
•Select a reason code from the drop-down list.
•Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)
•Click Save.

Unknown Client Exception

Tips for preventing Unknown Client exceptions:

- Make sure approved authorization is in the Sandata EVV portal.
- Ask employees to double-check their entries and retry when a client is not found.
- Provide employees with a Worker Visit Card with the accurate client ID: www.dhs.wisconsin.gov/library/collection/p-02844
- Remind employees to check their client ID entries.
- Make sure an accurate landline phone number is on file.

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Here are some tips for preventing Unknown Client exceptions:

•Make sure approved authorization is in the Sandata EVV portal.

  •If the authorization has not been approved, work with payers to ensure the approved authorization is sent to DHS.

  •If the authorization is approved but delayed, EVV Customer Care can help.

  •There are some situations where an authorization is not needed by policy. Where allowed, add client information: Only clients with under 50 hours of T1019 fee–or-service, clients with home health care EVV service codes, and clients with service code 99509. In these situations, DHS allows providers to enter the required authorization information in the Sandata system. We'll cover this in the "Entering required authorization information" presentation.

•Provide employees with a Worker Visit Card with the client's information, and make sure the Client ID is accurate..

•Remind employees to double-check their entries and retry when client is not found.

•Make sure an accurate landline phone number is on file, if the exception was in a TVV visit.

Correcting Unknown Employee Exceptions

Unknown Employee Exception

- The Unknown Employee exception shows when the Santrax ID entered during a TVV or FVV call in/call out does not match to an active employee within the Sandata EVV portal.
- The ID entered is displayed instead of the employee's name.
- This exception type must be fixed for the visit to be in a verified status.

This exception can happen when an employee mistypes their ID in TVV (either during a TVV check in or check out) or when calling in the FVV values. The number they typed will be displayed instead of the employee's name.

Let's go over how to fix this exception.

Unknown Employee Exception

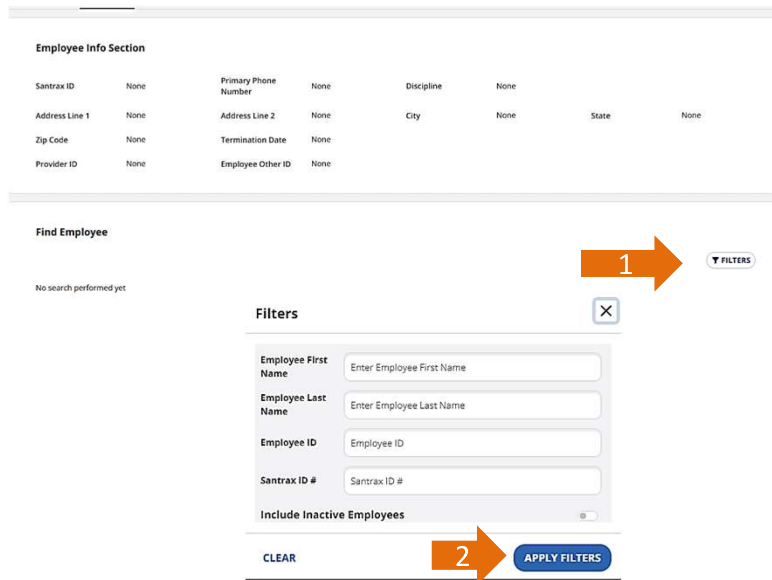
Click the exception dot under the Employee Name column.

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT
(51 0 ●	●	●	03/08/2024	05:50 AM	●

We're going to select and then correct—so, selecting the dot under the Employee Name column.

Unknown Employee Exception

- Click **Filter** to open the options to search for an employee.
- Add employee information to narrow search results.
- Click **Apply Filters**.

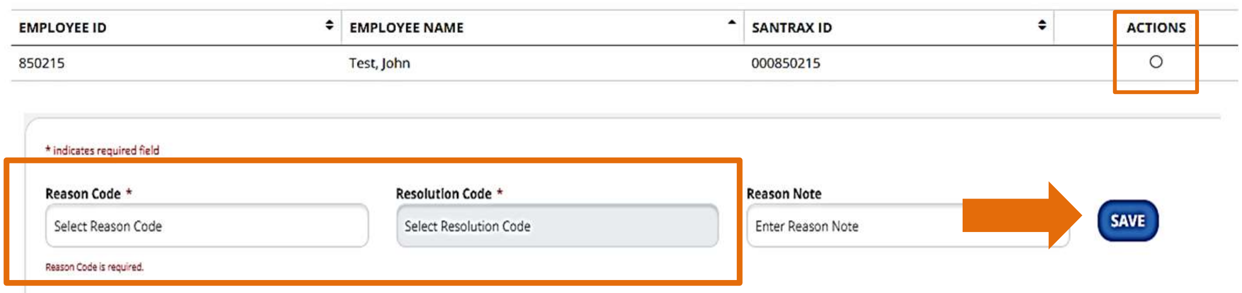


We're brought right to the screen where you can correct: we'll search for an employee and add them to the visit.

First, in the Find Employee section, click Filter (see arrow #1) to open the filter options to narrow the search for an employee. Enter as much or as little information as you'd like. You can leave some fields blank.
Second, click Apply Filters.

Unknown Employee Exception

- Select the employee Action button
- Select a reason code from the drop-down list.
- Select the resolution code, Written Documentation Maintained.
- Click Save.



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Select the employee by clicking their Action button.

Then as we've seen before, an edit will bring these extra fields:
•Select a reason code from the drop-down list.
•Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)
•Click Save.

Is the employee missing from the list? Check what you entered in the filter and try again.

Reminder: Whenever a new hire is made, providers should enter that employee in the ForwardHealth Portal. The employee information from ForwardHealth is added the next day to this Sandata EVV portal. If an employee was not added in ForwardHealth, their information will not be here in the Sandata EVV portal.

Unknown Employee Exception

Tips for preventing Unknown Employee exceptions:

- Add new workers on ForwardHealth Portal and obtain the employee ID as soon as possible. This will also be their Santrax ID.
- Inform employees of their Santrax ID number.
- Provide employees with a Worker Visit Card, which includes the employee's Santrax ID: www.dhs.wisconsin.gov/library/collection/p-02844
- Ask employees to check their Santrax ID if it is not recognized during a TVV or FVV call in or call out and retry the entry.

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Tips for preventing Unknown Employee exceptions:
•Add new workers on the ForwardHealth Portal and obtain the employee ID as soon as possible. This will be their Santrax ID to use during visits.
•Inform employees of their Santrax ID number.
•Provide employees with a Worker Visit Card, which includes the employee's Santrax ID. Make sure it's copied down correctly.
•Ask employees to check their Santrax ID if it is not recognized during a TVV or FVV call in or call out and retry the entry.

Correcting Missing Service Exceptions

Missing Service Exception

- The Missing Service exception shows when an incorrect service is chosen for the client.
- This type of exception must be fixed for the visit to be in a verified status.

It is important for providers to inform their employee which service to select when entering a visit. If a service is not entered, there will be a missing service exception.
This type of exception must be fixed for the visit to be in a verified status.

Service Codes

www.dhs.wisconsin.gov/evv/service-codes.htm

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

The webpage listed here gives a full list of the services codes that require EVV. In addition, the portion of the Worker Visit Card shown here lists all the services, how they are listed on the SMC app, and what two-digit number is entered if calling it in on TVV.

Missing Service Exception

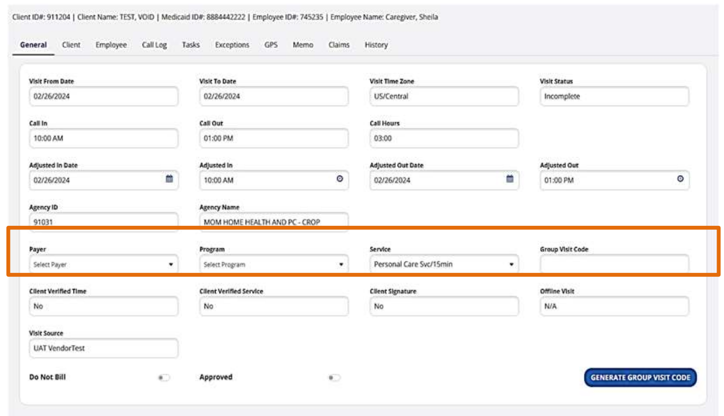
Click the exception dot under the Service column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Visit Status	Do Not Bill	Approved	Actions
	Caregiver, Martha	PCS Nurse Supervisory Visit/Visit	05/10/2024	11:05 AM	11:34 AM	00:29	11:05 AM	11:34 AM		Incomplete			

As usual, we'll select the exception by clicking on it.

Missing Service Exception

- Select the correct service from the **Service** field drop-down list.
- Select the correct **Payer** from the drop-down list.
- Select the correct **Program** from the drop-down list.



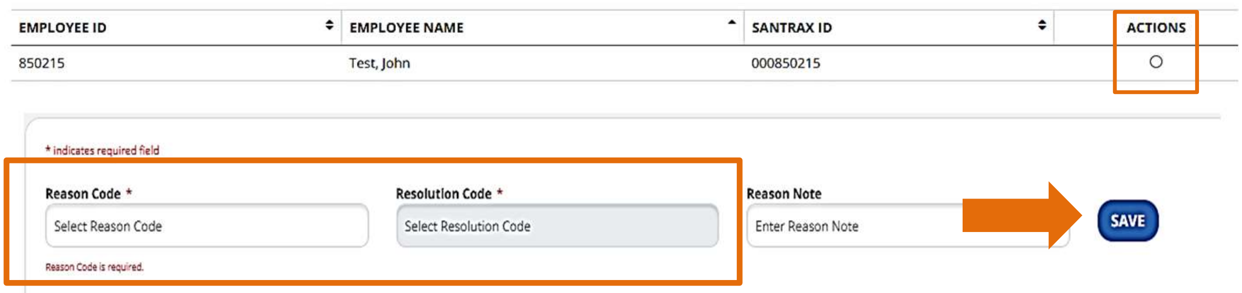
And we'll correct it.
To correct a missing service exception:

Select the correct service from the Service field drop-down list.
Select the correct Payer from the drop-down list.
Select the correct Program from the drop-down list.

Important tip: The service, payer, and program must all match the authorization on file in Sandata.

Missing Service Exception

- Select a **Reason Code** that best explains why the service was not selected at the time of visit.
- Select the resolution code **Written Documentation Maintained**.
- Click **Save**.



Now we'll take care of the information at the bottom of the screen:

•Select a reason code from the drop-down list.
•Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)
•Click Save.

Missing Service Exception

Tips for preventing Missing Service exceptions:

- Provide employees with the service code to select.
- If using TVV, employees will need the Sandata two-digit code for the service.
- Provide employees with a filled-out Worker Visit Card for each client. The template can be found on the DHS EVV webpage/resources: www.dhs.wisconsin.gov/library/collection/p-02844

Be sure to provide employees with the service code information they need. Provide employees with a filled-out Worker Visit Card for each client.

Correcting Unauthorized Service Exceptions

Unauthorized Service Exception

The unauthorized service exception can occur when:

- The employee started a visit for an unknown client (offline) without the client information entered.
- The employee chose the wrong service on SMC, TVV, or FVV.
- The service date of the visit is outside the authorization effective dates.
- There are two authorizations in the Sandata EVV portal from two different payers for the same client and timeframe.

The Unauthorized Service exception shows when the service selected is not valid for the client based on their authorization.

This exception occurs because:

- The employee started a visit for an unknown client (offline) without the client information entered.
- The employee chose the wrong service on SMC, TVV, or FVV.
- The service date of the visit is outside the authorization effective dates.
- There are two authorizations in the Sandata EVV portal from two different payers for the same client and timeframe. The system isn't able to know which to choose.

Unauthorized Service Exception

Click the exception dot under the Service column.

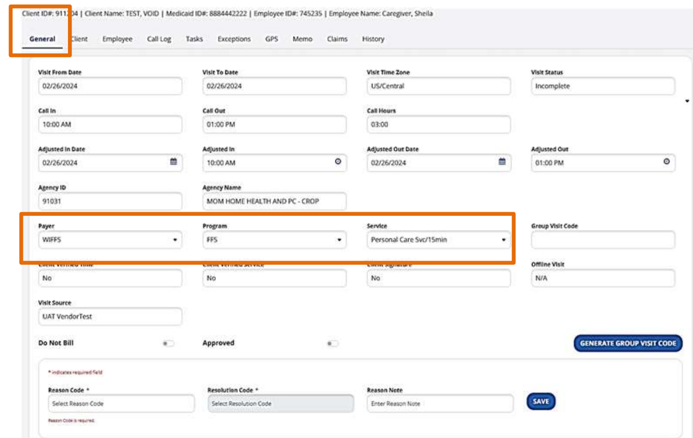
Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	VISIT STATUS	DO NOT BILL	APPROVED	ACTIONS
TEST, VOID	Caregiver, Sheila	Personal Care Svc/15min	02/26/2024	10:00 AM	01:00 PM	03:00	10:00 AM	01:00 PM		Incomplete	☐	☐	
TESTCLIENT, FFSREGRESSION	Test, John	Unspecified Therapeutic Procedure - OT/Visit	02/21/2024	01:00 PM	03:00 PM	02:00	01:00 PM	03:00 PM		Incomplete	☐	☐	
						Total: 05:00							

First, you select by clicking on the red exception dot. (The yellow dot, according to Sandata's legend in upper left corner, means it was manually entered. This is not an exception needing to be corrected.)

Unauthorized Service Exception

- Select the **General** tab.
- Select the correct service from the **Service** field drop-down list.
- Select the correct **Payer** from the drop-down list.
- Select the correct **Program** from the drop-down list.

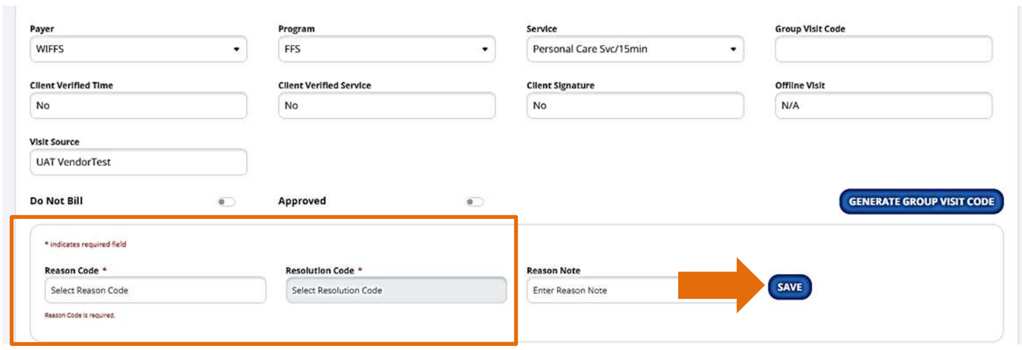


Now you correct.
Make sure you're in the "General" tab from the options at the top.
•Select the correct service from the **Service** field drop-down list.
•Select the correct **Payer** from the drop-down list.
•Select the correct **Program** from the drop-down list.

Important Tip: The service, program and payer must match what is on file for the authorization.

Unauthorized Service Exception

- Select a reason code from the list.
- Select the resolution code, Written Documentation Maintained.
- Click **Save**.



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And as usual, finish with the reason code and resolution code.
•Select a reason code from the drop-down list.
•Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)
•Click Save.

Unauthorized Service Exception

Tips for preventing unauthorized service exceptions:

- Make sure approved authorization service codes and effective dates are in the Sandata EVV portal.
- Inform employees of the correct service to select when entering a visit.
- Ensure employees have the correct two-digit code for the service to use when entering a visit through TVV or FVV.
- Provide employees with a Worker Visit Card for each client: www.dhs.wisconsin.gov/library/collection/p-02844.

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Tips for preventing unauthorized service exceptions:

- Make sure approved authorization service codes and effective dates are in the Sandata EVV portal.
- Inform employees of the correct service to select when entering a visit.
- Ensure employees have the correct two-digit code for the service to use when entering a visit through TVV or FVV.
- Provide employees with a Worker Visit Card for each client. Highlight the service to select, and the two-digit code for that service if using TVV or FVV.

As you can see, a lot of errors can be prevented by making sure employees have the information they need during a visit.

Unauthorized Service Exception

- Use Sandata reports:
  - The Expiring Authorizations report tracks authorizations that are close to expiring.
  - The Members Without Authorization report tracks clients that have no authorizations on file.

These Sandata reports can help to monitor authorizations that may be missing or soon to expire.

Unauthorized Service Exception

- If an approved authorization is not loaded to Sandata in three days of being notified by the payer of the approval, contact EVV Customer Service.
- There are some situations where an authorization is not needed by policy. To get the information loaded to the Sandata system, providers will need to enter it. Refer to the "Adding Required Authorization Information in the Sandata EVV Portal" presentation, www.dhs.wisconsin.gov/publications/p03550.pdf.

DHS sends authorizations to the Sandata system. If approved authorization is not loaded to Sandata in 3 days of being notified by the payer of the approval, contact EVV Customer Service.

There are some situations where an authorization is not needed by policy. To get the information loaded to the Sandata system, providers will need to enter it. We'll cover this in the "Adding Required Authorization Information in the Sandata EVV Portal" presentation, linked here. Entering in the required information will prevent an unauthorized service exception.

Correcting Unmatched Client ID/ Phone Exceptions

Unmatched Client ID/Phone

- The Unmatched Client Phone/ID exception shows when the phone number the call was made from is not a number listed in the Sandata EVV portal for the client.
- This exception type must be acknowledged for the visit to be in a verified status.

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•The Unmatched Client Phone/ID exception shows when the landline phone number the call was made from is not a number listed in the Sandata EVV portal for the client.
•This exception type must be acknowledged for the visit to be in a verified status.

Unmatched Client ID/Phone

Click the exception dot under the Client Name column.

Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	VISIT STATUS	DO NOT BILL	APPROVED	ACTIONS
Full, Wonder	Caregiver, Sheila	Speech Therapy - Individual/Visit	09/07/2023	03:53 PM	04:03 PM	00:10	03:53 PM	04:03 PM		Incomplete	☐	☐	

As with other exception dots, we'll click on it to select it.

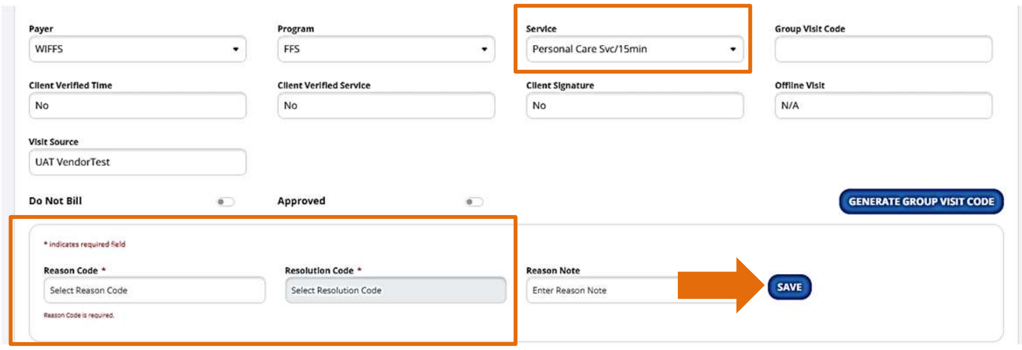
Unmatched Client ID/Phone

Click on the **Acknowledge This Exception** checkbox on the Unmatched Client ID/Phone exception line.

Now, we'll correct. This is the only exception that is not fixed—it is acknowledged. Check the box that says "Acknowledge this exception." There's no way to go back in time to "fix" what phone number was used. Acknowledging it will remove the exception and be considered corrected.

Unmatched Client ID/Phone

- Select a reason code from the list.
- Select the resolution code, Written Documentation Maintained.
- Click **Save**.



And as usual, finish with the reason code and resolution code.
•Select a reason code from the drop-down list.
•Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)
•Click Save.

For your information, you can see the phone number used for the visit in the Call Log screen.

Unmatched Client ID/Phone

Tips for preventing Unmatched Client Phone/ID exceptions:

- Ensure the TVV calls are made from the landline phone listed in the Sandata Client file.
- Compare Sandata's record of the client's phone number with the provider’s record by using the Active Clients report.

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Tips for preventing Unmatched Client Phone/ID exceptions:

- Ensure the TVV calls are made from the landline phone listed in the Sandata Client file.
- Compare Sandata's record of the client's phone number with the provider’s record by using the Active Clients report.

Unmatched Client ID/Phone

- Help clients keep address and phone number information up-to-date through ACCESS, their Consortia, their Family Care MCO, or IRIS consultant agency (ICA).
- For most programs, the client can report changes to their local income maintenance agency or tribe online on the ACCESS website or by using the Information Change Report.
- Including other applicable entities such as the Social Security Administration, SSI record, and the foster care system.

A client's responsibility to keep their address and phone number information up-to-date has not changed:

- This is typically done through ACCESS, their Consortia, their Family Care MCO, or IRIS consultant agency (ICA).
- For most programs, the client can report changes to their local income maintenance agency or tribe online on the ACCESS website or by using the Information Change Report.
- Clients are also responsible for updating other applicable entities such as the Social Security Administration, SSI record, and the foster care system.

Unmatched Client ID/Phone

- For IRIS clients:
  - Contact their IRIS consultant, who can update that information in the DHS IRIS system. The IRIS consultant can use the Family Care, Partnership, PACE, or IRIS Change Routing form, F-02404 (www.dhs.wisconsin.gov/forms/f02404.docx)
  - Contact their IRIS Consultant Agency.
  - Contact the IRIS Call Center for assistance: 888-515-4747.

IRIS clients have these resources to assist them, as well:

- IRIS consultant
- IRIS Consultant Agency
- IRIS Call Center

Unmatched Client ID/Phone

- Add a valid and verifiable landline phone number to the Sandata client file to prevent this exception. This will not update any other systems.

Refer to the Client Data Entry section of the DHS EVV Training website:
www.dhs.wisconsin.gov/evv/training-administrators.htm

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And finally, if this is a valid landline that will be used again:

•Add a valid and verifiable landline phone number to the Sandata client file to prevent this exception. This will not update any other systems.

Refer to the Client Data Entry section of the DHS EVV Training website for a video or PowerPoint about how to add a phone number:
www.dhs.wisconsin.gov/evv/training-administrators.htm

Correcting a Missing Call In or Call Out Exception

Visit Without Check In/Check Out

This exception shows a visit that does not have either a call in or call out time.

- Sandata refers to “call in” and “call out” for all methods: SMC, TVV, FVV, or manually entered.
- Administrators should try the Merge Call function first. If that is not an option, the missing call time can be added.

The “visit without call in/call out” exception shows a visit that does not have either a call in or call out time. Don’t let the word “call” limit your thinking. Sandata refers to “call in” and “call out” for all methods: SMC, TVV, FVV, or visits that are manually entered on the Sandata EVV portal.

There are two ways to handle this exception:

1. Administrators should try the Merge Call function first.
2. If that is not an option, the missing call time can be added.

We’ll go over each of these options.

Visit Without Check In/Check Out

Tips for preventing missing call in/call out exceptions:

- Train employees on the importance of using EVV for both the call in and call out times.
- Note trends in the employee's use of EVV and offer additional training if needed.
- Set goals with each employee to improve their EVV use. Help them use reminders, such as a cell phone alert, timer bell, or co-worker reminder.

Tips for preventing missing call in/call out exceptions:
•Train employees on the importance of using EVV for both the call in and call out times.
•Note trends in the employee's use of EVV and offer additional training if needed.
•Set goals with each employee to improve their EVV use. Help them use reminders, such as a cell phone alert, timer bell, or co-worker reminder.

Merging Calls

Merging Calls

The **Merge Calls** option in Visit Details will display if the system shows several incomplete calls that may be able to merge to provide one complete visit. The incomplete calls have overlapping information, including:

- Same employee ID
- Same date of service
- Same client

Merging calls is a clever way the Sandata system has of correcting some exceptions.

The Merge Calls option will display only if the system shows several incomplete calls that could merge to provide one complete visit. The incomplete calls have overlapping information, including:
•Same employee ID
•Same date of service
•Same client

Let's go through an example.

Merging Calls

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	VISIT STATUS	DO NOT BILL
Jackson, Cedrick ●	So ni	Speech Therapy - Individual/Visit	09/28/2023	●	03:15 PM	Incomplete	☐
Jackson, Cedrick ●	So ni	●	09/28/202	12:57 PM	●	Incomplete	☐
(6 '68 ●	●	●	09/28/2023	02:31 PM	●	Incomplete	☐
(6 '68 ●	●	●	09/28/2023	02:32 PM	●	Incomplete	☐
(6 '68 ●	●	●	09/28/2023	02:33 PM	●	Incomplete	☐
(6 '68 ●	●	●	09/28/2023	02:33 PM	●	Incomplete	☐
Jackson, Cedrick ●	So ni	●	09/28/2023	02:34 PM	●	Incomplete	☐
(6 '68 ●	●	●	09/28/2023	03:11 PM	●	Incomplete	☐
(6 '68 ●	●	●	09/28/2023	03:14 PM	●	Incomplete	☐
(6 '68 ●	●	●	09/28/2023	03:19 PM	●	Incomplete	☐

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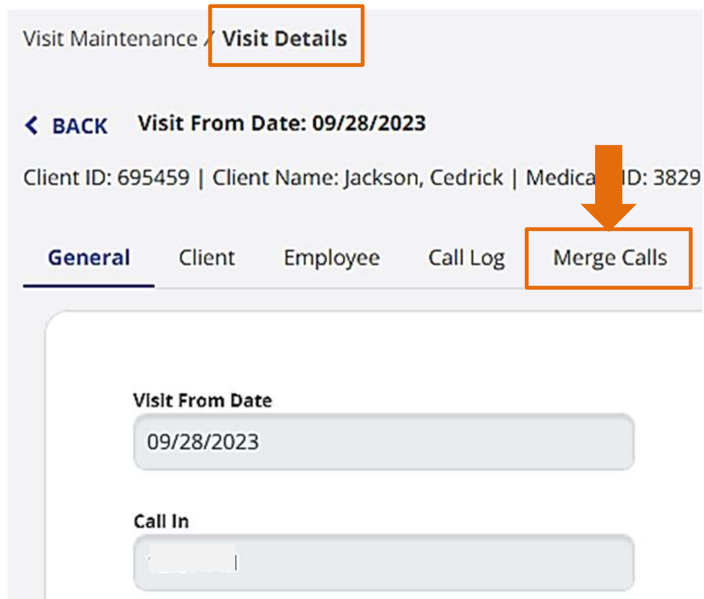
Here we have several incomplete visits. They were all made in a short timeframe—the afternoon of September 28. Some are missing a call in, and some are missing a call out. Can any of these be merged? Let's find out.

Since the top row has the most information, we'll start there.

As usual, select (click on) the row to open the Visit Details screen for edits. We'll be looking to combine the 2:34 p.m. "Call In" line to go with the 3:15 p.m. "Call Out" time.

Merging Calls

Click **Merge Calls** tab to view other calls that can be merged to the visit.



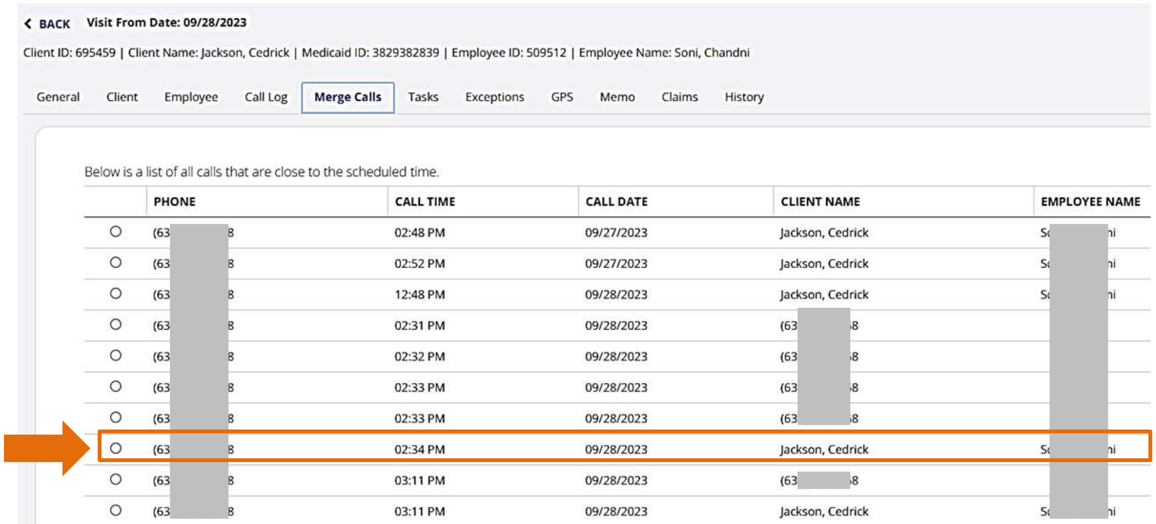
When the Visit Details screen opens, you see the "Merge Calls" tab is available to use. That's good news, because it may offer us an easy way to get the rest of the visit information we need. If it isn't there, a merge isn't possible.

Click on the Merge Calls tab to view other calls that might complete the information here.

Merging Calls

Confirm the correct visit.

Select the row.



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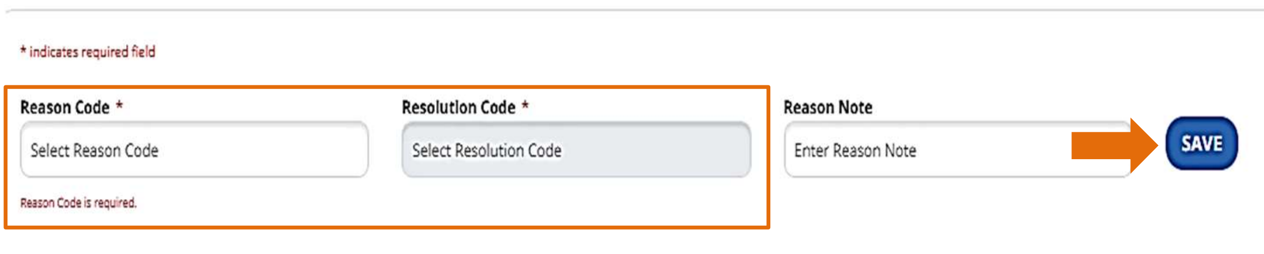
The system gives these possibilities of incomplete visits to merge. Some of them are from the day before, September 27, and some are from the same date, September 28.

You may need to confirm with the employee or client to find the accurate match to the visit. In this example, we found the row with the 2:34 p.m. call time on September 28, is accurate.

Once you're sure these details are accurate for the visit, select the circle next to the row to merge it.

Merging Calls

- From the drop-down menu, click the **reason code** and **resolution code**.
- Enter a **reason note** if needed.
- **Save**.



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And as usual, finish with the reason code and resolution code.
•Select a reason code from the drop-down list.
•Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)
•Click Save.

Merging Calls

The two rows of information are merged to one row.

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE				CALL IN	CALL OUT	VISIT STATUS	DO NOT BILL
Jackson, Cedrick	So[redacted]ni	Speech Therapy - Individual/Visit	09/28/2023	02:34 PM	03:15 PM	00:41	02:34 PM	03:15 PM	Incomplete	☐
(63[redacted]58			09/28/2023	02:31 PM			02:31 PM		Incomplete	☐
(63[redacted]58			09/28/2023	02:32 PM			02:32 PM		Incomplete	☐
(63[redacted]58			09/28/2023	02:33 PM			02:33 PM		Incomplete	☐
(63[redacted]58			09/28/2023	02:33 PM			02:33 PM		Incomplete	☐
(63[redacted]58			09/28/2023	03:11 PM			03:11 PM		Incomplete	☐
(63[redacted]58			09/28/2023	03:14 PM			03:14 PM		Incomplete	☐
(63[redacted]58			09/28/2023	03:19 PM			03:19 PM		Incomplete	☐

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We can go back to view the row for the visit we edited and see the information we merged is now included.

The row from below that used to only have a 2:34 “call in” time is no longer in the list, because the information from it merged with that top row.

Success!

Adding a Manual Call

We can't always be lucky enough to have calls merge. Here's the second way to add missing call in or out information: adding a manual call.

Add Manual Call

- Check for the Merge Calls tab before adding a call in or out.
- Verify the missing call in or out time with the employee.
- Add a manual call if a visit is missing a call in or call out time.

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•Check for the Merge Calls tab before adding a call in or out. We've just seen what a timesaver this can be. Use it when you can.
•Verify the missing call in or out time with the employee.
•If a merge option isn't available, edit to include the missing time. This is what Sandata means by "a manual call."

Let's look at an example.

Add Manual Call

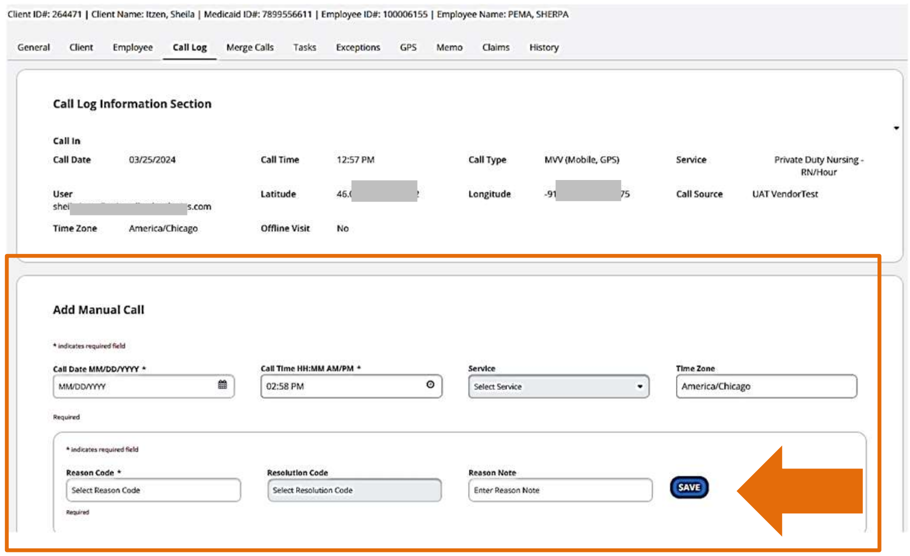
Click on the row to select the visit.

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	VISIT STATUS	DO NOT BILL	APPROVED	ACTIONS
It[redacted]ila	PEMA, SHERPA	Private Duty Nursing - RN/Hour	03/25/2024	12:57 PM	●		12:57 PM			Incomplete	☐	☐	✎

As usual: you will click the row to select the visit.

Add Manual Call

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



In this example, a Merge Call tab does not appear near the top. There aren't any calls that the system thinks could complete this one, so we'll ask the employee or client for the details and enter them here.

Then as we've seen before:
- Select a reason code from the drop-down list.
- Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)
- Click Save.

Create Call

Creating a call is different from adding a manual call that we just went over. Let's take a look.

Create Call

Difference between Create Call, Manual Call (previous section), and Create Visit (next section):

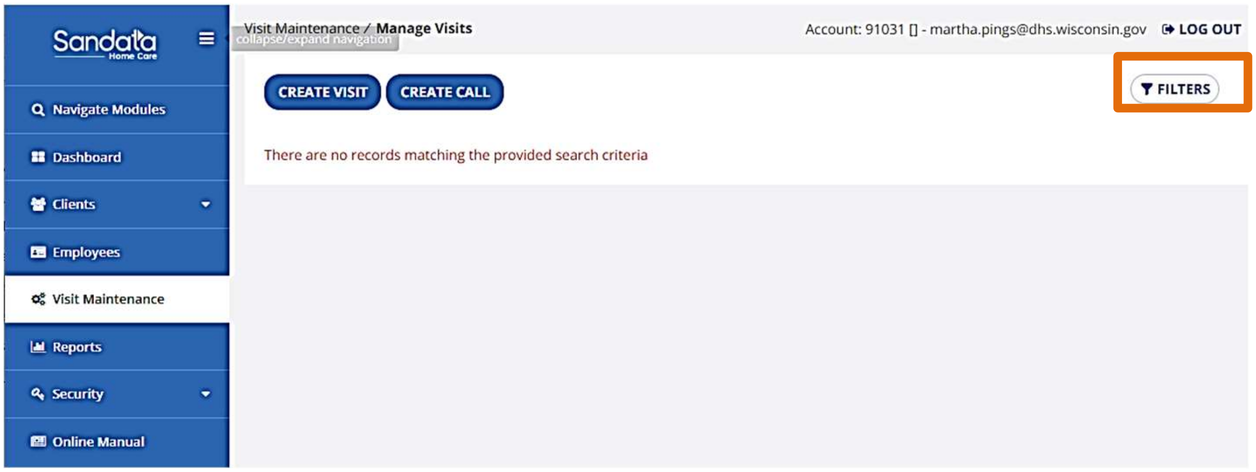
- **Create Call** has limited use. It is used when a visit is in progress, and *only an in call* needs to be created to start a visit.
- **Manual Call** is used when a visit exists in the past but is missing a single call in or call out time.
- **Create Visit** is used when an entire visit needs to be created, from start to finish (see next section).

What's the difference between Create Call and Manual Call?

- **Create Call** has limited use. It is used when a visit is in progress, and only an in call needs to be created. Maybe the employee called the provider at the start of the visit because they could not use the usual check in method.
- **Manual Call** is used when a visit exists in the past but is missing a single call in or call out time. You might be able to merge with another incomplete visit, or you may need to add a single in or out time.
- **Create Visit** is used when an entire visit needs to be created, from start to finish (see next section).

Create Call

Use the **Filters** button to view visits and avoid duplicates.



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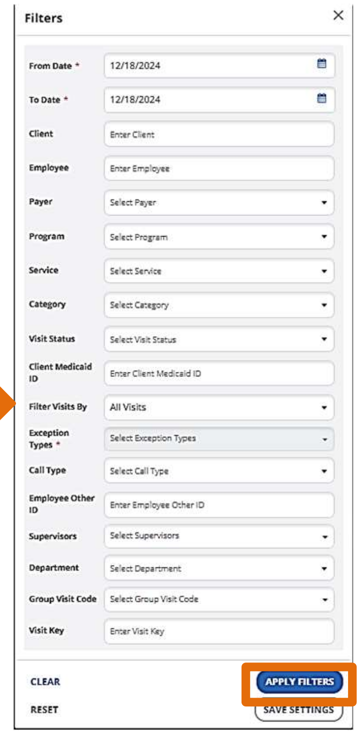
It's best to start with Filters to look for the visit, so you can make sure the call is truly missing and you're not creating a duplicate.

Create Call

Within the filter, select the information needed.
Filter Visits By should be set to "All Visits."

Click **Apply Filters** when you are ready.

- If the visit exists, make sure the information is correct.



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

You can enter portions of a name if you are not sure of a spelling (for example, "Kell" if you are not sure if it's Kelly or Kelley).

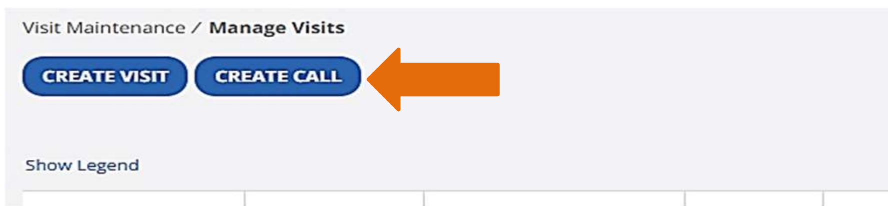
Filter Visits By should be set to "All Visits."

Click "Appy Filters" when you are ready.

If the visit exists, simply sure the information is correct.

Create Call

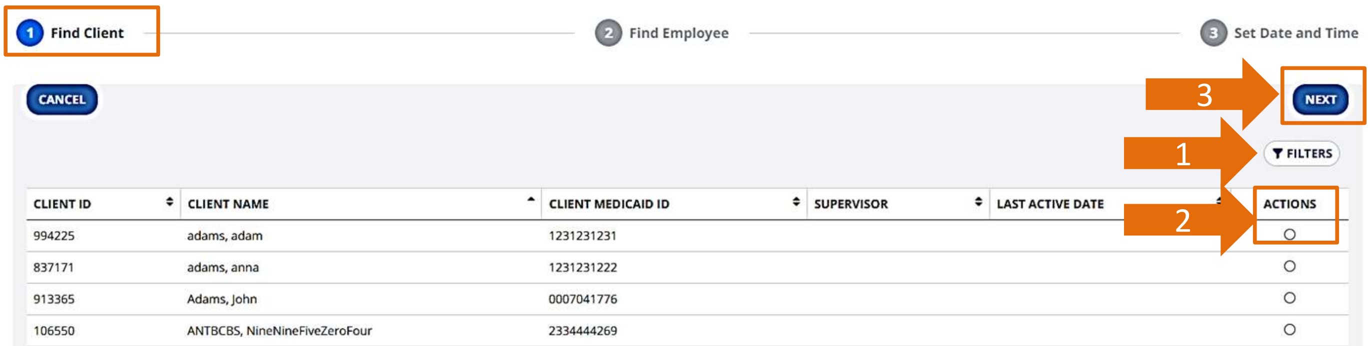
If the visit currently in progress is missing, click the **Create Call** button.



If the visit currently in progress isn't found, click the Create Call button.

Create Call

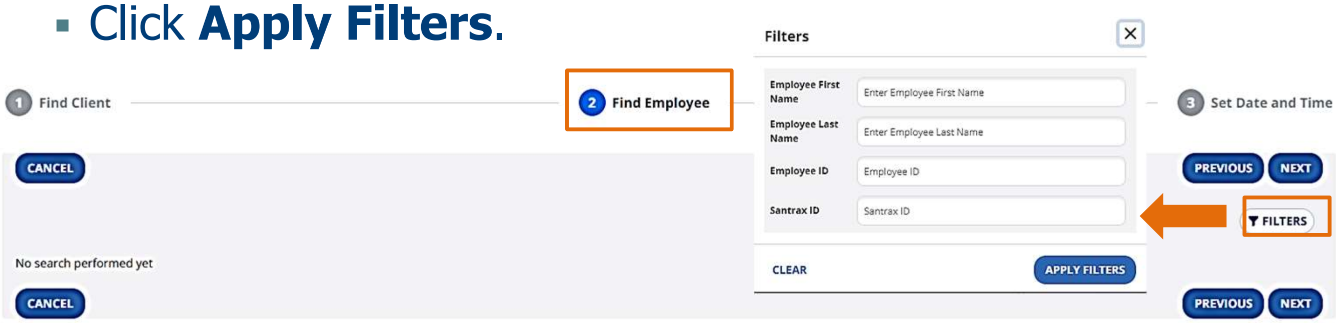
- Find the client. Use the **Filters** feature to shorten the list.
- Select the client using the **Actions** button on the right.
- Click **Next**.



The numbered steps tabs at the top will automatically lead you through the information you'll need to add.
First, find the client. You can scroll down the list of all clients or use the Filters feature to shorten the list to one client's name.
Second, select the client using the Actions button on the right.
Third, click Next.

Create Call

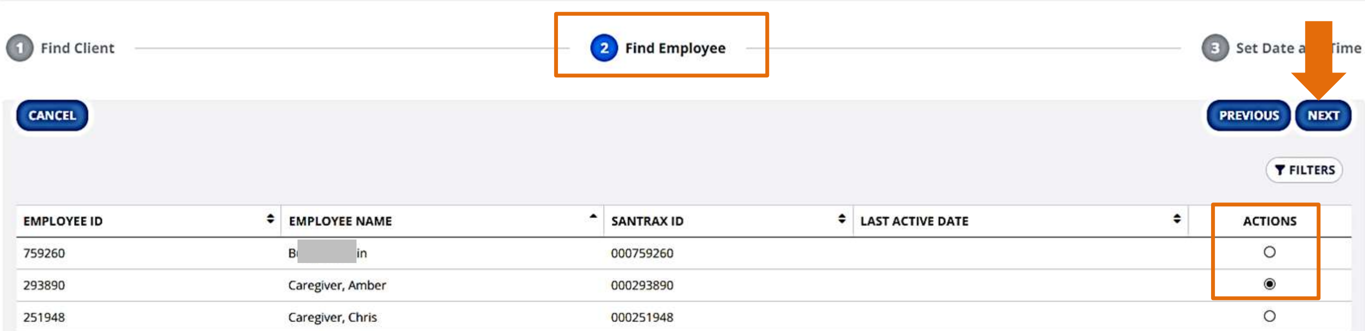
- On the **Find Employee** screen, open the **Filters**.
- Enter the employee’s name or leave blank for a list of all employees.
- Click **Apply Filters**.



The Find Employee screen will display next.
Click on the Filters button to search for a specific employee name or leave it all blank for a list of all employees.
Click Apply Filters.

Create Call

- Select the employee, using the **Actions** button on the right.
- Click **Next**.



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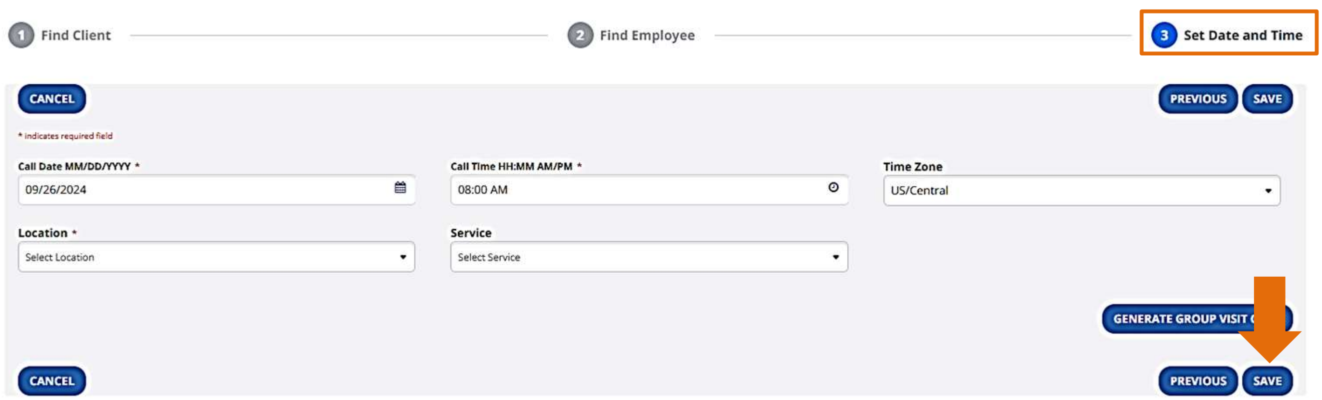
More than one employee may display, depending on the information you entered for the search.
Select the employee using the Actions button at the right.
Click Next.

Create Call

- Enter the start date and time, location, and service.
- Click **Save.**



Now, the Set Date and Time screen will display.
Enter the remaining information: the start date and time, location, and service.
Click Save.

Create Call

- The Visit Status is listed as "In Process."
- The visit will show an exception in the Call Out column until the visit is ended.

Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTIONS
adams, adam	Caregiver, Amber	Mechanical Vent Care/Hour	09/26/2024	08:00 AM	●		08:00 AM			In Process	☐		
						Total: 00:00							

25 of 1 entries

« < 1 > »

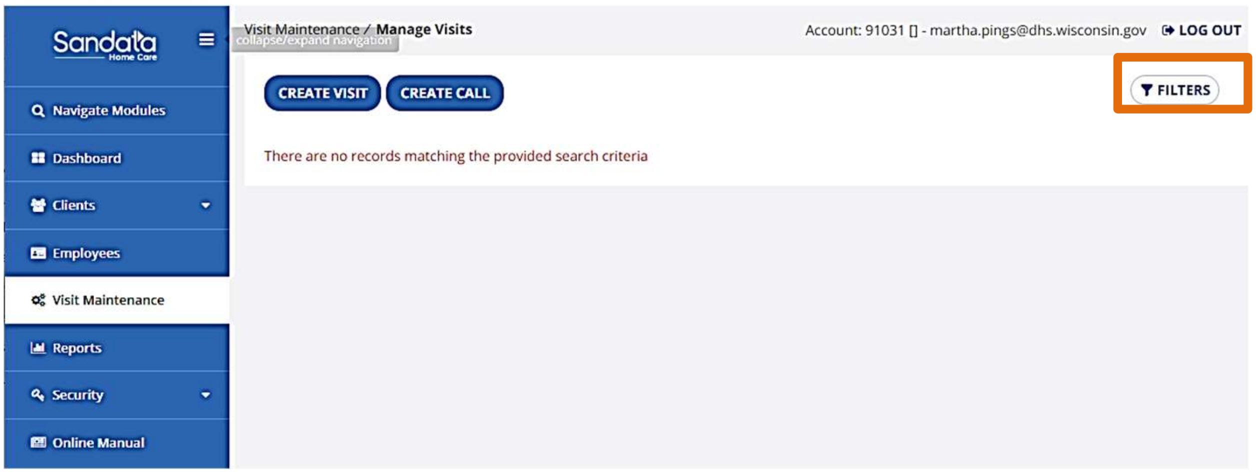
Notice that the "Visit Status" column shows the visit is "In Process." Since only a call in was created, the visit will show an exception in the Call Out column until the visit is ended.

Create Visit

Let's see how you create a complete visit on the Sandata EVV portal as an administrator, from start to finish. This is used when a worker (or independent nurse) forgot to check in and out for the entire visit.

Create Visit

Use the “Filters” option to view visits.



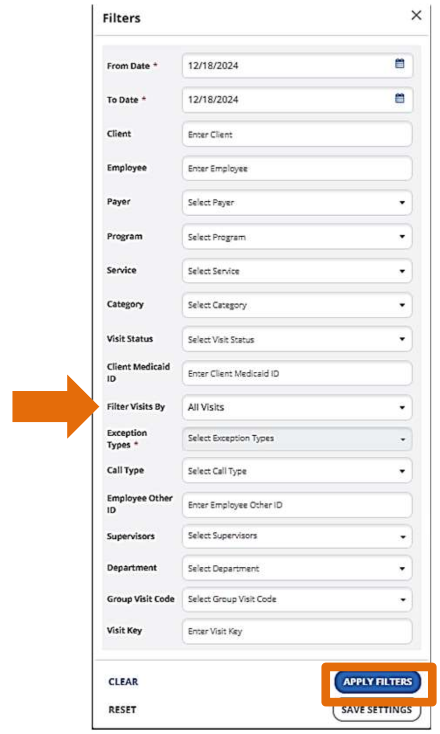
It’s best to start with Filters, so you can make sure the visit is truly missing and you’re not creating a duplicate.

Create Visit

Within the filter, select the information needed.
Filter Visits By should be set to "All Visits."

Click **Apply Filters** when you are ready.

- If the visit exists, make sure the information is correct.
- If the visit is missing, create the visit.



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

You can enter portions of a name if you are not sure of a spelling (for example, "Kell" if you are not sure if it's Kelly or Kelley).

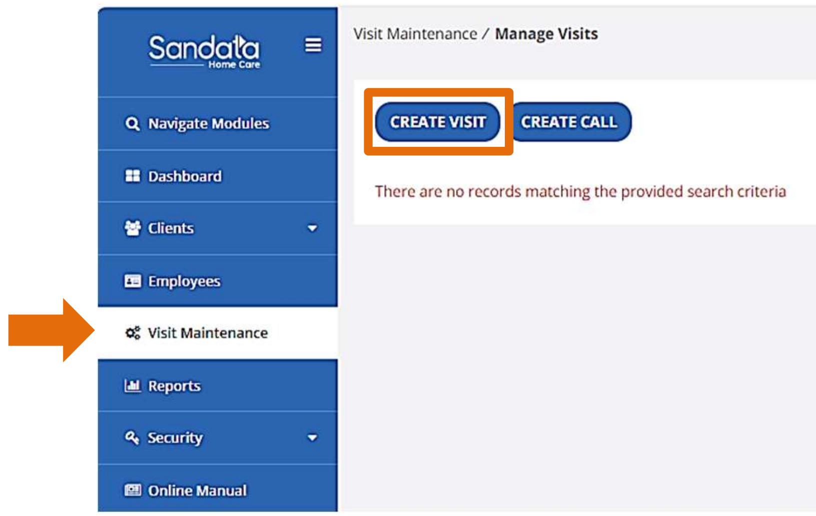
Filter Visits By should be set to "All Visits."

Click "Appy Filters" when you are ready.

- If the visit exists, make sure the information is correct.
- If the visit is missing, create the visit.

Create Visit

- Click on **Visit Maintenance**.
- Click **Create Visit**.



If you've confirmed the visit doesn't already exist:
Click on Visit Maintenance.
Click Create Visit

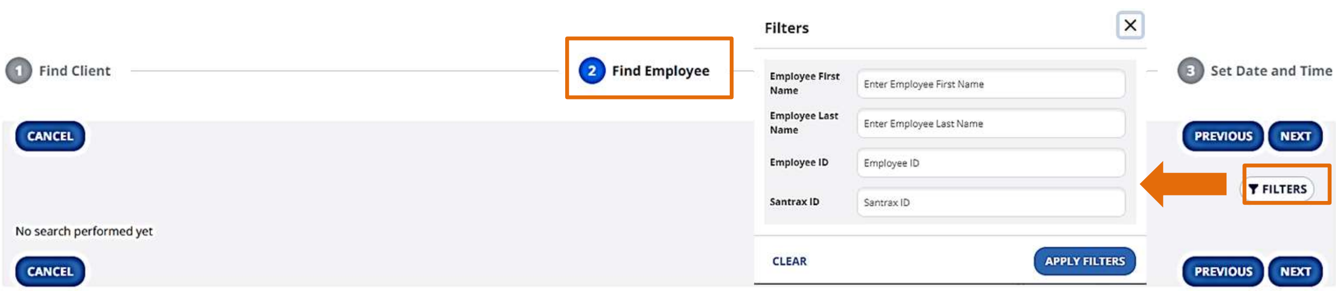
Create Visit

- Find the client. Use the **Filters** feature to shorten the list.
- Select the client using the **Actions** button on the right.
- Click **Next**.

The numbered steps tabs at the top will automatically lead you through the information you'll need to add.
First, find the client. You can scroll down the list of all clients or use the Filters feature to shorten the list to one client's name.
Select the client using the Actions button on the right.
Click Next.

Create Visit

- On the **Find Employee** screen, open the **Filters**.
- Enter the employee's name or leave blank for a list of all employees.
- Click **Apply Filters**.



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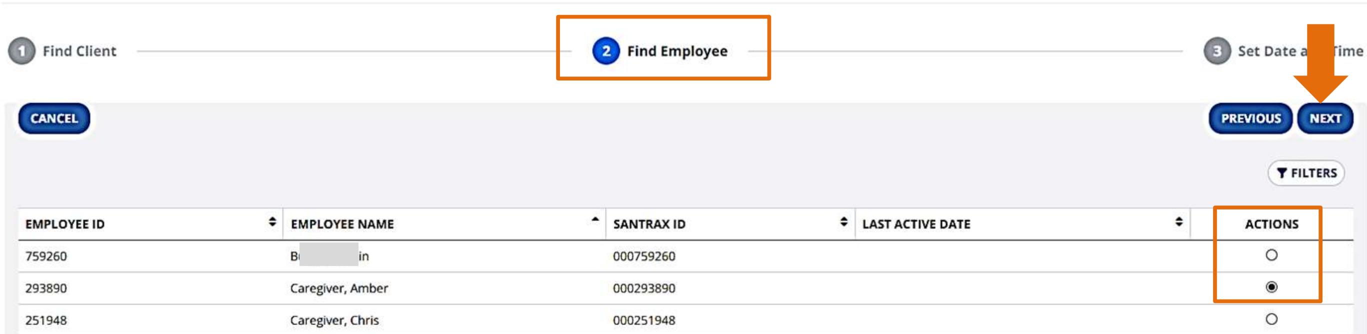
The Find Employee screen will display next.
Click on the Filters button to search for a specific employee name or leave it all blank for a list of all employees.
Click Apply Filters.

Create Visit

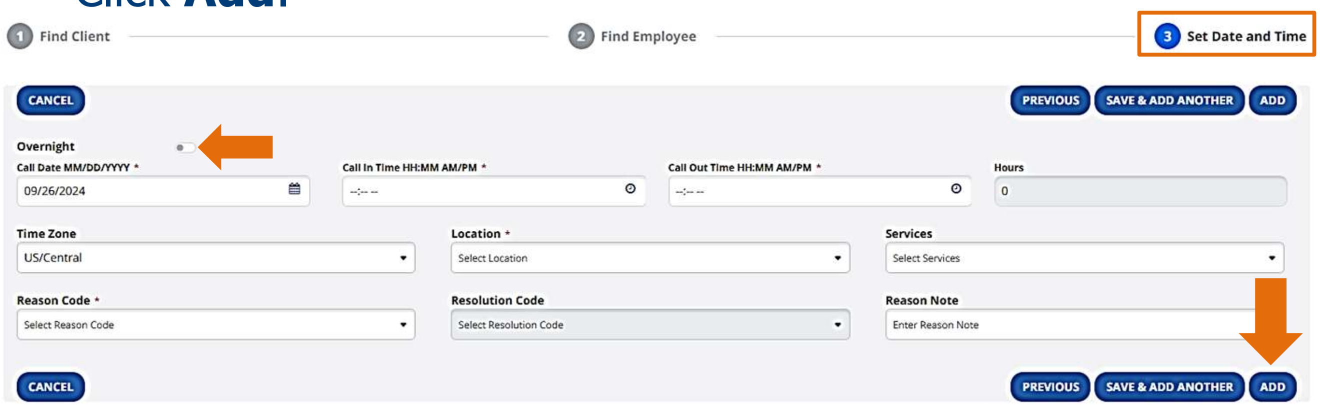
- Select the employee, using the **Actions** button on the right.
- Click **Next.**



More than one employee may display, depending on the information you entered for the search.
Select the employee using the Actions button at the right.
Click Next.

Create Visit

- Enter the date and time information, location, service, reason code, and resolution code.
- Click **Add**.



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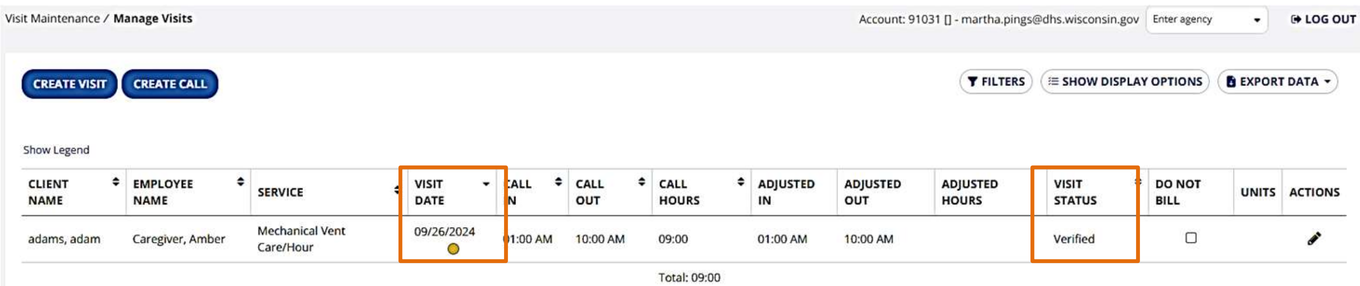
On the Set Date and Time screen, enter the remaining information: the date and time of the visit, location, service, the reason code and resolution code.
Click Add.

If the visit was for an overnight, be sure to check the “Overnight” box near the top left, marked here with an arrow. This will let you enter a call out date that is different from the call in date.

Create Visit

- The Visit Status is listed as “Verified.”
- The visit will show with the yellow dot. This means it was manually entered**.**



Notice that the “Visit Status” column shows the visit is in a “Verified” status. There are no exceptions (red or orange dots) for this visit. (Remember, according to Sandata’s legend in the upper left corner, the yellow dot means it was manually entered. This does not need correction.)
The visit will show in Visit Maintenance with the yellow dot. This is an informational dot, and means the visit was manually entered. It is not an exception.

Adjusting a Visit
Call In or Call Out

Sometimes an employee may let you know the time they called in or out for their visit wasn't accurate. Maybe they needed to provide vital care to the client before checking in, or maybe they forgot to check out until a half hour later.

Here's how to adjust a visit's call in or call out time.

Adjusting Call In or Call Out

- Providers can correct or adjust a call in or call out time if the employee reports they have captured the EVV visit time incorrectly.
- Adjusting call in or call out times can be done on any visit if necessary, including verified visits.

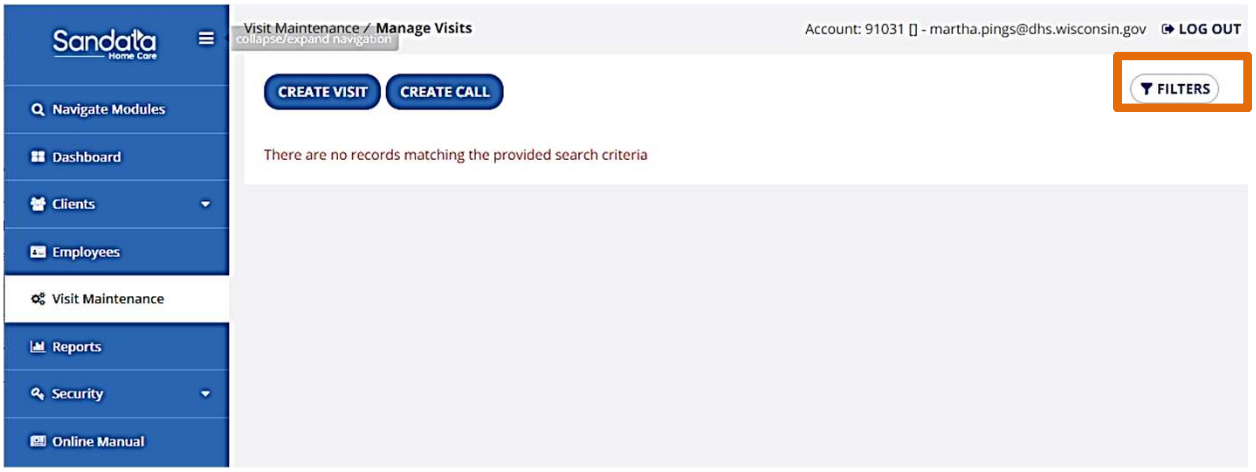
Providers can correct or adjust a call's in or call out time if the employee reports they have captured the EVV visit time incorrectly.

Adjusting call in or call out times can be done on any visit if necessary, including verified visits.
Remember: There is no scheduling component in the DHS-provided Sandata system. A visit that was perfectly submitted but for a timeframe that wasn't according to expectations won't have any exceptions flagged.

For many of our examples so far, we've had exceptions to show us what visits needed attention. How will you find a visit that has inaccurate time, but is considered complete and has no exceptions?

Adjusting Call In or Call Out

Use the "Filters" option to view visits.



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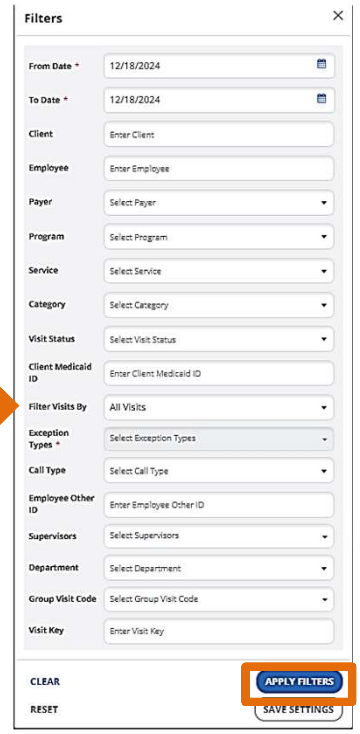
Use the Filters option in the Visit Maintenance area to find the visit.

Adjusting Call In or Call Out

- Select “All Visits” from the **Filter Visits By** drop-down menu.
- Enter other information such as the date span, client name, and employee name.
- Click **Apply Filters**.



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

You can enter portions of a name if you are not sure of a spelling (for example, "Kell" if you are not sure if it's Kelly or Kelley).

Select “All Visits” from the “Filter Visits By” dropdown menu. This will include visits that don’t have exceptions.
You can also enter in a date span and client or employee name to search for exactly the visit you need.

Click “Appy Filters” when you are ready.

Adjusting Call In or Call Out

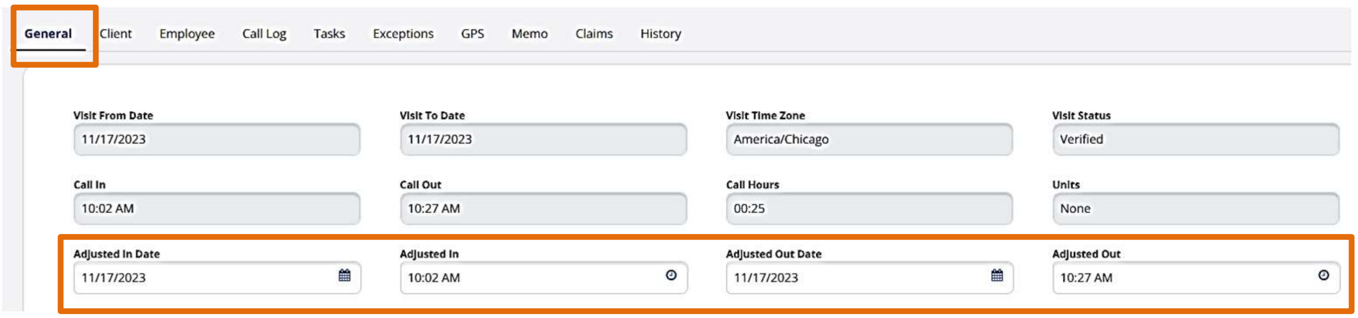
Click on the pencil icon to select the visit for an edit.

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	ADJUSTED IN	ADJUSTED OUT	VISIT STATUS	ACTIONS
BURNS, B	PEMA, SHERPA	Unspecified Home Visit - RN and LPN/Visit	11/17/2023	10:02 AM	10:27 AM	10:02 AM	10:27 AM	Verified	

Here we have a visit without any exceptions. To edit this visit, click on the pencil icon.

Adjusting Call In or Call Out

Enter the corrected information in the **Adjusted In** or **Adjusted Out** fields.

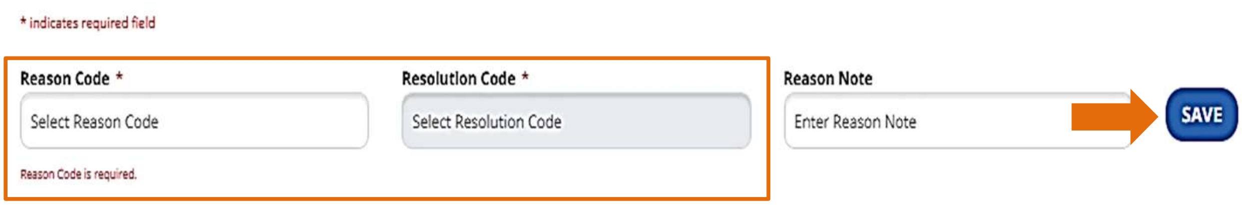


And now you can correct.

In the "General' tab, enter the correct information in the Adjusted In or Adjusted Out fields.

Adjusting Call In or Call Out

- From the drop-down menu, click the **reason code** and **resolution code**.
- Enter a **reason note** if needed.
- **Save**.



As usual when there are edits, the reason and resolution fields will display. Use the drop-down menus to enter the required information.
Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)

Then click Save.

Omit Status

We have a few last tools to introduce to you. The first is setting a visit's status to "Omit." We've already seen "omit" as a Visit Status. Here is how that status comes about.

Omit Status

Visit information is never deleted from the Sandata EVV portal. Calls that are accidental or not needed can be set apart from regular view by assigning an "Omit" status to them. This is useful for:

- Robocalls
- Practice calls during training
- Duplicate manual visits created in error

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Visit information is never deleted from the Sandata EVV portal. Calls that are accidental or not needed can be set apart from regular view by assigning an "Omit" status to them. This is useful for calls that you'd not want to bring to a verified status or pass along to a payer. For example:

•Robocalls
•Practice calls during training
•Duplicate manual visits created in error

Omit Status

Robocalls may come into the TVV toll-free number.

- No employee and client information
- No call out
- No service code

Practice calls are helpful during training but risk being mistaken for actual visits.

Sometimes you may notice visits with exceptions almost all the way across. These may be from robocalls to the TVV line. Robocalls can happen to a TVV toll-free phone line just as they do to our personal phone lines. You can identify robocalls because there's no information entered, only a time and date in.

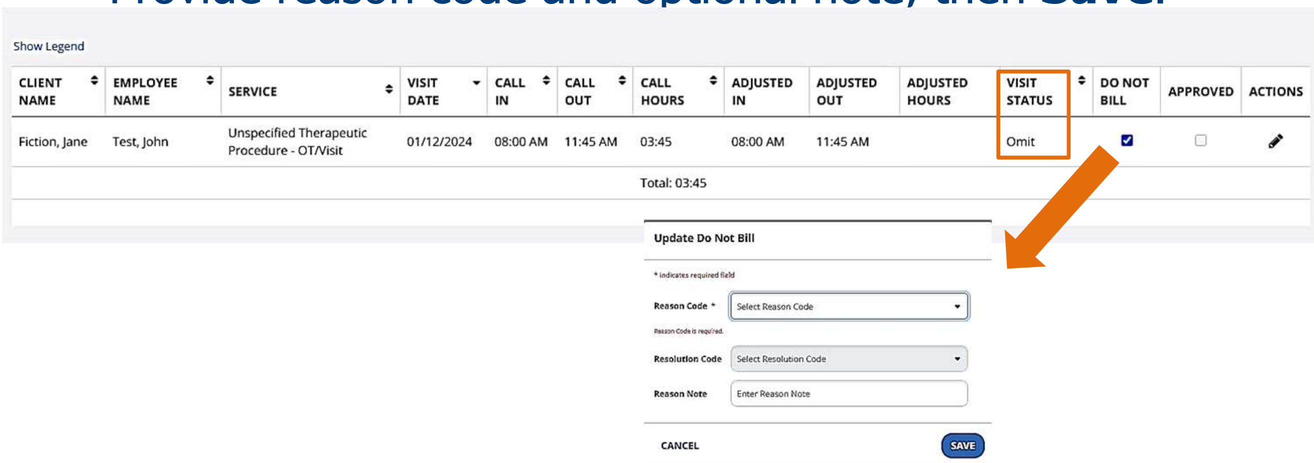
- No employee and client information
- No call out
- No service code

Providing hands-on experience with the SMC app, TVV, or even FVV is a great training technique. They will result in visit information within the Sandata EVV portal, however.

Assigning an "Omit" status is a good way to set these types of calls aside so they don't appear as exceptions needing to be handled or calls that may be sent to payers.

Setting Omit Status

- Within the visit's row, mark the **Do Not Bill** box.
- Provide reason code and optional note, then **Save**.



A helpful way to set these calls aside is to check the "Do not bill" box within the row. This is a confusing title, since the DHS-provided Sandata system does not include billing. It does what it needs to, however: it separates or omits these unwanted visits from the list of actual visits. Note that the "Visit Status" column now shows "Omit," since the "Do Not Bill" box is marked.

The pop-up box seen here will display when you mark the "Do Not Bill" box. Fill out the required reason code, a note if you'd like, and save.

Client Verification, Notes, and Tasks

Let's move on to topics that are NOT exceptions – visit verification, client signature, notes, and tasks.

Client Verification, Notes, and Tasks

- Fee-for-service personal care providers may choose to use the Sandata EVV portal to capture all elements of the record of care for T1019 personal care services.
- Personal care providers should check with their HMOs, MCOs, or IRIS FEA regarding documentation requirements.
- Home health care service providers do not need to capture record of care within EVV.

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•Fee-for-service personal care providers may choose to use the Sandata EVV portal to capture all elements of the record of care for T1019 personal care services.
•Personal care providers should check with their HMOs, MCOs, or IRIS FEA regarding documentation requirements.
•For home health care providers: Capturing client verification, notes, and tasks within the Sandata EVV app is not required for home health care service providers.

Client Verification, Notes, and Tasks

- If any part of the record of care is missing from the Sandata EVV portal, it will not set a visit exception.
- Providers can monitor record of care data collection using the Sandata **Employee Visit Log** date range report.

Report Parameters
Account: MOM HOME HEALTH AND PC - CROP (91031)
For: 12/1/2023 - 12/31/2023 11:59:59 PM

EMPLOYEE VISIT LOG

PAYER: CAREWI

VISIT							LOCATION IN		LOCATION OUT		EMPLOYEE			CLIENT			
PRG	VISIT KEY	DATE	TIME IN	TIME OUT	HOURS	STATUS	LATITUDE, LONGITUDE	PHONE #	LATITUDE, LONGITUDE	PHONE #	NAME	EMPLOYEE ID	SANTRAX ID	NAME	ID / MEDICAID	SIG	OFFLINE VISIT
WIHMO	2159144788	12/29/2023	1:08 PM	1:17 PM	0.15	Verified		303		30 23	PASANG, SHERPA	100006156	100006156	Mc ,	87 1001	N	N/A
HCPCS:	99504																
Task List:	0100																
		Total Hours:			0.15												
		Grand Total Hours:			0.15												
Note: Report is limited to Verified Visits only. Visits with remaining exceptions in an Incomplete status are not included																	

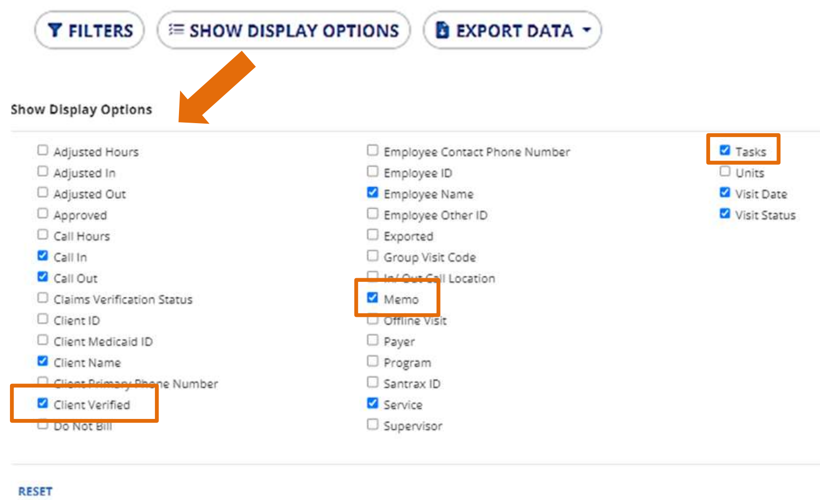
Sandata 04/12/2024 13:06:09 Page 1 of 1

If any part of the record of care is missing from the Sandata EVV portal, it will not create an exception.

Therefore, the best way to monitor record of care data collection is using the Sandata Employee Visit Log date range report. This report was created specifically for Wisconsin's personal care providers. You can easily see which visits have the tasks, notes, and client verification using this report.

Client Verification, Notes, and Tasks

In Visit Maintenance, use **Show Display Options** to view Client Verified, Memo, and Tasks columns for visits.



In addition to the Employee Visit Log report, in Visit Maintenance you can choose "Show Display Options" to add Client Verified, Memo, and Tasks columns to view in a list of visits

Client Verification, Notes, and Tasks

- **Export Data** to save to your computer.
- Click on a row to see more details.

FILTERS | SHOW DISPLAY OPTIONS | EXPORT DATA

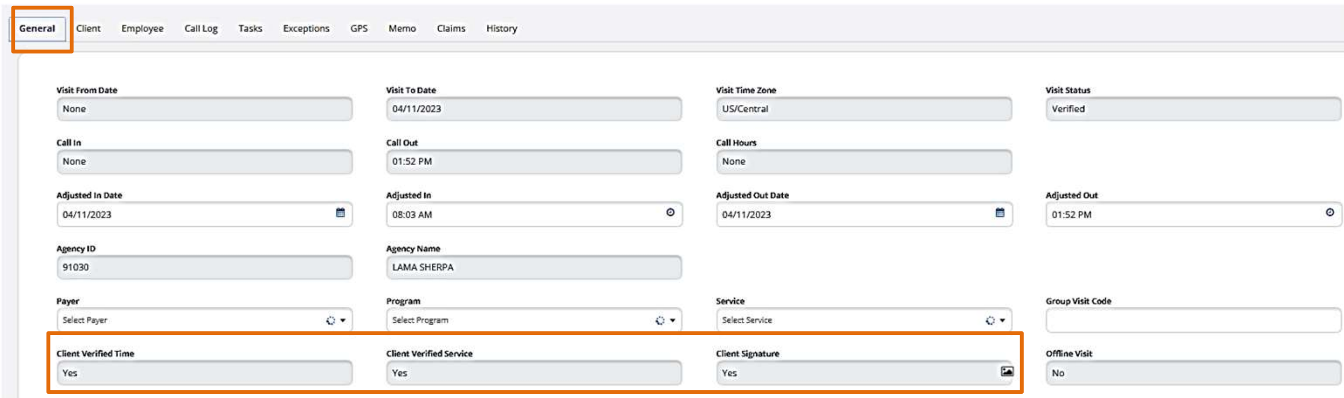
Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	TASKS	VISIT STATUS	MEMO	CLIENT VERIFIED	ACTIONS
Chris, WIMember	Austin, T	Personal Care Svc/15min	04/11/2023		01:52 PM	3	Verified	Emp...	Y	
BILLS, RICK	Austin, T	Supportive Home Care/15min	11/22/2022	12:01 PM	12:06 PM	1	Incomplete		Y	
Tester, Helen	Austin, T	Personal Care/Day	11/23/2022		11:23 AM	1	Incomplete		Y	
	Austin, T	Personal Care/Day	10/10/2022		04:39 PM	1	Incomplete		Y	
Ace, WIMember	Caregiver, Carrie	Personal Care Svc/15min	04/11/2023	01:00 AM	02:00 AM	0	Verified		N	
Ace, WIMember	SHERPA, DIL	Personal Care Svc/15min	04/11/2023	01:00 AM	03:00 AM	0	Verified		N	

Use the “Export Data” button to save the information to your computer as a CSV or Excel file.
As usual, to see more details of the visit, click on the row.

Client Verification, Notes, and Tasks

Use the "General" tab to view client verification information.



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In the Visit Details screen for that row, use the "General" tab to view client verification information. The fields are grayed out, showing they are read-only and cannot be changed.

Client Verification, Notes, and Tasks

Use the “Tasks” tab view or edit the tasks.

General | Client | Employee | Call Log | **Tasks** | Exceptions | GPS | Memo | Claims | History

Tasks

TASK ID	DESCRIPTION	READING	MANUALLY ADDED	STATUS	SELECT TASK
0135	Toileting		No	Completed	☑
0305	Housekeeping		No	Completed	☑
0310	Laundry as needed		No	Completed	☑
0200	Bowel Program Medically Oriented Tasks				☐
0205	Catheter Site Care Medically Oriented Tasks				☐
0210	Complex Positioning Medically Oriented Tasks				☐
0105	Dressing-Changing				☐
0120	Eating Assistance				☐
0300	Eyeglass-Hearing Aids Care				☐
0215	Feeding Tube Site Care Medically Oriented Tasks				☐

Use the “Tasks” tab to view or edit the tasks. Click the button in the “Select Task” column on the right to add or remove any tasks. If edits are made, the Reason Code and Resolution Code fields will show at the bottom for you to complete.

Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)

Client Verification, Notes, and Tasks

Use the "Memo" tab view notes or add a memo.

Use the "Memo" tab to view notes entered during the visit. While visit notes (on the bottom) are grayed out and cannot be edited, the "Memo" field (on the top) can be used. Click "Save" if a memo is added.

GPS Location

Another topic that is not an exception is GPS location.

GPS Location

The GPS location data is informational only.

- GPS captures location information only at the start and end of a visit.
- GPS location data does not prevent the EVV visit from going to a “verified” status.
- GPS data does not currently prevent claims from being paid.

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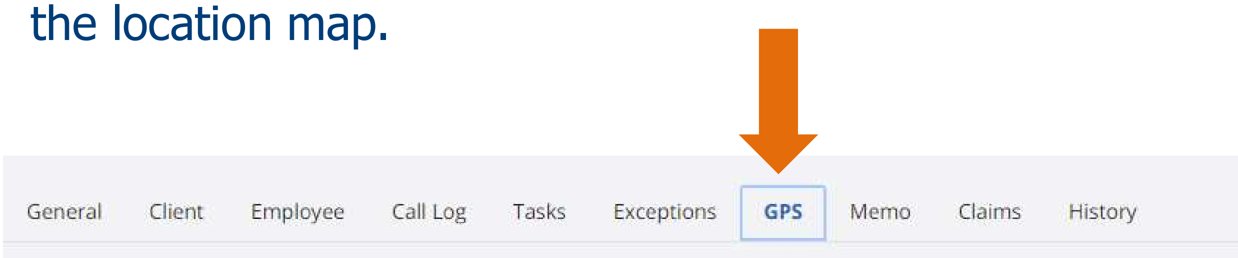
The GPS location data is informational only:
•GPS captures location information only at the start and end of a visit.
•GPS location data is required but does not prevent the EVV visit from going to a “verified” status.
•GPS data does not currently prevent claims from being paid.

Also understand that other divisions within DHS, such as the Office of Inspector General, may use GPS location.

GPS Location

How to find the GPS location information for a specific visit:

- In Visit Maintenance, click on a visit.
- From the Visit Detail screen, click the **GPS** button to view the location map.



To find GPS location information for a specific visit:
•In Visit Maintenance, click on a visit.
•From the Visit Detail screen, click the GPS button to view the location map.

GPS Location

This location map shows a GPS *informational* "exception" since the check in and out were not done near an address on file with Sandata for the client.

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This location map shows a GPS "exception" (informational only) since check in and out were not done near an address on file with Sandata for the client.

The provider has the ability to follow up with the employee, get more details, and provide client-specific information to ensure the best support.

Despite the labels provided in Sandata, GPS location is not considered an "exception." GPS is informational only in Wisconsin.

GPS Location

Reasons GPS **may not** match the address on file for the client:

- The services were performed in the community.
- The client's address has not been updated.
- Sandata uses Google Maps for client location and the Google property pin may be set inaccurately.
- There may be an issue with the smart phone being used or the smart phone settings.
- There may be an issue with a building or hill that may make GPS inaccurate.

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Reasons GPS may not match the address on file for the client:
•The services were performed in the community.
•The client's address has not been updated.
•Sandata uses Google Maps for client location and the Google property pin may be set inaccurately.
•There may be an issue with the smart phone being used or the smart phone settings.
•There may be an issue with a building or hill that may make GPS inaccurate.

GPS Location

Providers can monitor the location of services using the **GPS Distance Exception** report.

Report Parameters
Account: MOM HOME HEALTH AND PC - CROP (91031)
For: 3/25/2024 - 3/25/2024 11:59:59 PM

GPS DISTANCE EXCEPTION

ACCOUNT: MOM HOME HEALTH AND PC - CROP (91031)
PAYER: None
PROGRAM: None

CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	EMPLOYEE ID	EMPLOYEE NAME	EMPLOYEE EMAIL	ACTUAL CALL DATE	ACTUAL CALL TIME	HCPCS	VISIT KEY	DISTANCE (FT)	CLOSEST CLIENT ADDRESS
913365	Adams, John	0007041776	100006155	PEMA, SHERPA	She[redacted].com	03/25/2024	12:53 PM	T1019	2159159554	1191641	747[redacted]dence Ct,[redacted],53701-0000
913365	Adams, John	0007041776	100006155	PEMA, SHERPA	She[redacted].com	03/25/2024	12:36 PM	T1019	2159159554	1191641	747[redacted]dence Ct,[redacted],53701-0000
Sub Total # of Visits		2									

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There is a report that summarizes GPS information, if providers would like to use it. It will show all the day's visits where the distance is further from a client's known address than expected. Look for "GPS Distance Exception" in the Daily Reports. It will show how far (in feet) the service was from an address on file.

Despite the name of this report, GPS location is not considered an "exception." GPS is informational only in Wisconsin.

Resources

Resources

- EVV Customer Care
  - Phone: 833-931-2035, Monday–Friday, 7 a.m.-6 p.m.
  - Email: VDXC.ContactEVV@wisconsin.gov
- EVV webpage: www.dhs.wisconsin.gov/evv/index.htm
  - Training resources
  - Information about EVV in Wisconsin

Thank You

Thank you for the important services you provide to clients.

WISCONSIN DEPARTMENT of HEALTH SERVICES