

Visit Maintenance: Correcting Unknown Employee Exceptions



P-02754B (01/2025)

This is for administrators focused on correcting the unknown employee exception. For more information about all visit maintenance functions in the Sandata EVV Portal, see the "Visit maintenance and clearing exceptions in Sandata" section of www.dhs.wisconsin.gov/evv/training-administrators.htm

Correcting Unknown Employee Exceptions

Let's look at correcting unknown employee exceptions. This is an exception that displays on the Sandata EVV portal dashboard.

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.

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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 [REDACTED] 00) | ● | ● | 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**.

The screenshot shows the 'Find Employee' section of a web application. At the top, there is an 'Employee Info Section' with a table of fields: Santrax ID, Primary Phone Number, Discipline, Address Line 1, Address Line 2, City, State, Zip Code, Termination Date, Provider ID, and Employee Other ID. Below this is the 'Find Employee' section with the text 'No search performed yet'. A 'Filters' modal is open, containing input fields for 'Employee First Name', 'Employee Last Name', 'Employee ID', and 'Santrax ID #', along with a checkbox for 'Include Inactive Employees'. At the bottom of the modal are 'CLEAR' and 'APPLY FILTERS' buttons. An orange arrow labeled '1' points to the 'FILTERS' button in the top right, and another orange arrow labeled '2' points to the 'APPLY FILTERS' button at the bottom of the modal.

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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.

| EMPLOYEE ID | EMPLOYEE NAME | SANTRAX ID | ACTIONS |
|-------------|---------------|------------|---------|
| 850215 | Test, John | 000850215 | ○ |

* indicates required field

Reason Code * **Resolution Code ***

Reason Note 

Reason Code is required.

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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.

Resources

Resources

- Wisconsin EVV Customer Care
- Provider and independent nurse information
- Training resources for admins, independent nurses, and workers
- Resources, including ForwardHealth Updates and FAQs

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

WISCONSIN DEPARTMENT OF HEALTH SERVICES

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EVV: Home

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Contact Us

Stay connected

Join our email list
Sign up to receive email notices about EVV in Wisconsin.

Have questions? Need help?
Wisconsin EVV Customer Care is available at 833-931-2035 or evv@wisconsin.gov Monday-Friday, 7 a.m.-6 p.m. Central Time.

Electronic Visit Verification (EVV)

What is EVV?

EVV uses technology to make sure that members and participants receive the services they need. Workers check in at the beginning and check out at the end of each visit, using a smart phone or tablet, small digital device, or landline telephone. The EVV system captures six key pieces of information:

- Who receives the service
- Who provides the service
- What service is provided
- Where the service is provided
- The date of service
- The time the service begins and ends

Here is the [list of personal care services and home health care services codes](#) that require workers to capture EVV information in Wisconsin.

EVV systems are secure and compliant with the Health Insurance Portability and Accountability Act (HIPAA).

What programs are required to use an EVV system?

- Personal care and supportive home care services (PCS)
 - Medicaid and BadgerCare Plus fee-for-service (ForwardHealth card)
 - BadgerCare Plus and Medicaid SSI HMOs

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Now let's take a quick look at the EVV home page. Here, and on every EVV webpage, you'll see the contact information for EVV Customer Care in the dark blue box. If you've not signed up for EVV emails, every EVV webpage has the link for you.

On the left of each page is the navigation tabs. Let's take a look at a few of these.

Providers and independent nurses will find information at www.dhs.wisconsin.gov/evv/providers.htm

Providers (including independent nurses) and workers can find helpful training resources at www.dhs.wisconsin.gov/evv/training.htm,

There are separate sections for administrator, independent nurse, and worker materials. If you're a video kind of person, there are videos available. If you're more of a reader, printable materials are here, too. And if you're looking for PowerPoints to present in a larger group, those are also available. Choose the kind of learning that works for your situation.

Our Resources section has great information. FAQs are there, as well as quick fact sheets: www.dhs.wisconsin.gov/evv/resources.htm

Thank You

Thank you for the important services you provide to members.

