

Visit Maintenance: Correcting Unknown Client Exceptions



P-02754C (01/2025)

This is for administrators focused on correcting the unknown client exception. For more info 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 Client Exceptions

Let's see how to correct unknown client exceptions in the Sandata EVV portal as an administrator.

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.

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"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.**

The screenshot displays a 'Find Client' interface. On the left, there is a table titled 'Client Contact Information' with columns for Address Type, County, SSN, Email Address, Time Zone, Address Line 1, State, Gender, Address Line 2, Zip Code, Language Preference, City, Supervisor, and None. Below the table is a 'Find Client' section with a search bar and a 'FILTERS' button. An orange arrow labeled '1' points to the 'FILTERS' button. To the right, a 'Filters' modal is open, showing input fields for Client First Name, Client Last Name, Client Medicaid ID, and Client ID. There is also a toggle for 'Include Inactive Clients'. An orange arrow labeled '2' points to the 'APPLY FILTERS' button at the bottom right of the modal. A 'CLEAR' button is also visible.

Client Contact Information													
Address Type	None	Address Line 1	None	Address Line 2	None	City	None						
County	None	State	None	Zip Code	None								
SSN	None												
Email Address	None	Gender	None	Language Preference	None	Supervisor	None						
Time Zone	None												

Find Client

1 → FILTERS

Filters

Client First Name: Enter Client First Name

Client Last Name: Enter Client Last Name

Client Medicaid ID: Enter Client Medicaid ID

Client ID: Enter Client ID

Include Inactive Clients: ☐

CLEAR 2 → 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	☐

10 of 12 entries

< 1 2 >

* indicates required field

Reason Code *

Select Reason Code

Resolution Code *

Select Resolution Code

Reason Note

Enter Reason Note

SAVE

Reason Code is required.

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**.

CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	ACTIONS
634976	Client, Test	333333330	☐
151036	Client, Test A	555551111	☒
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	☐

10 of 12 entries

Reason Code *

Select Reason Code

Reason Code is required

Resolution Code *

Select Resolution Code

Reason Note

Enter Reason Note

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.

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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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.



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