

Visit Maintenance: The Basics and Portal Dashboard



P-02754D (01/2025)

This is for administrators focused on learning the basics about the Sandata EVV Portal. For more information about visit maintenance functions in the Sandata EVV portal, see the “Visit Maintenance and Clearing Exceptions” section of <http://www.dhs.wisconsin.gov/evv/training-administrators.htm>

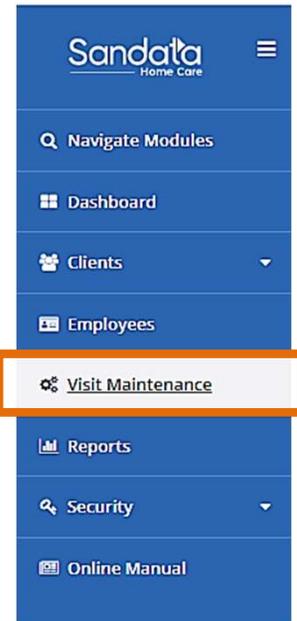
The Basics

Let's look at some basic information about the Sandata EVV Portal's Visit Maintenance features: searching for visits using filters, exceptions, reason codes, basic steps to correcting an exception, and the dashboard.

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.



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- 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 outside EVV.

This is where you’ll do the work of visit verification.

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.

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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:

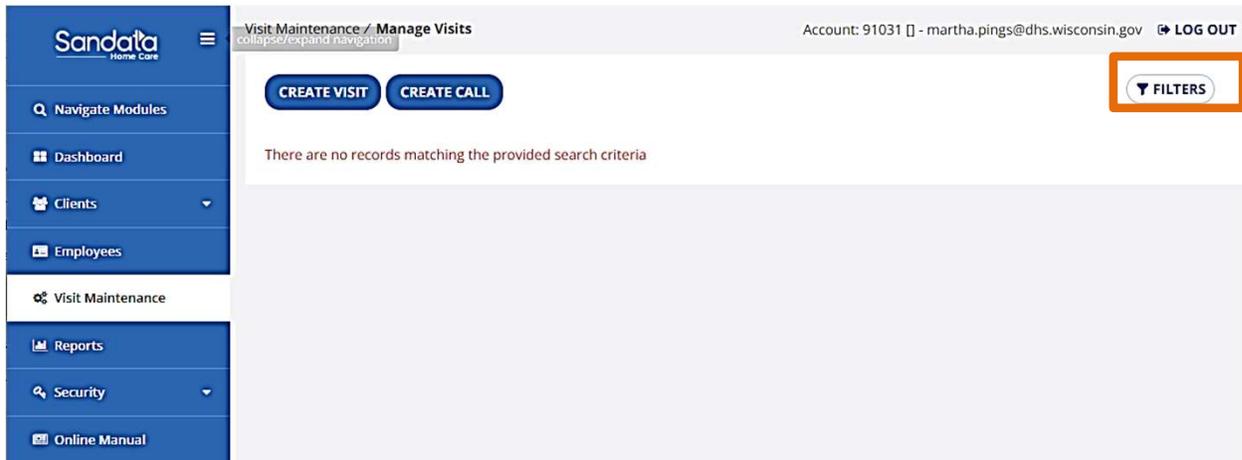
System Admin

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.

The screenshot shows a 'Filters' dialog box with the following fields and controls:

- From Date: 12/18/2024
- To Date: 12/18/2024
- Client: Enter Client
- Employee: Enter Employee
- Payer: Select Payer
- Program: Select Program
- Service: Select Service
- Category: Select Category
- Visit Status: Select Visit Status
- Client Medicaid ID: Enter Client Medicaid ID
- Filter Visits By: All Visits
- Exception Types: Select Exception Types
- Call Type: Select Call Type
- Employee Other ID: Enter Employee Other ID
- Supervisors: Select Supervisors
- Department: Select Department
- Group Visit Code: Select Group Visit Code
- Visit Key: Enter Visit Key

At the bottom of the dialog, there are four buttons: CLEAR, RESET, APPLY FILTERS, and SAVE SETTINGS. The CLEAR and RESET buttons are highlighted with an orange border.

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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.

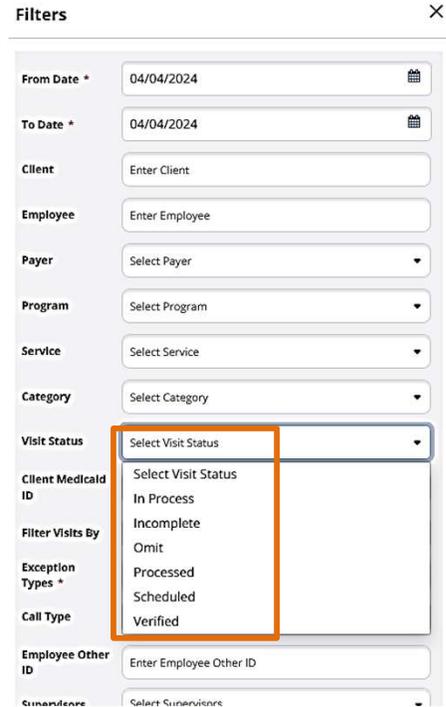
You can enter portions of a name if you are not sure of a spelling (for example, "Kell" if you are not sure if it's Kelly or Kelley).

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)



The screenshot shows a 'Filters' panel with various search criteria. The 'Visit Status' dropdown menu is open, displaying the following options: Select Visit Status, In Process, Incomplete, Omit, Processed, Scheduled, and Verified. The 'In Process' and 'Incomplete' options are highlighted with an orange border.

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

The screenshot shows a 'Filters' panel with various search criteria. The 'Visit Status' dropdown menu is open, showing the following options: Select Visit Status, In Process, Incomplete, Omit, Processed, Scheduled, and Verified. The 'Omit' option is highlighted with an orange border.

Filter	Value
From Date *	04/04/2024
To Date *	04/04/2024
Client	Enter Client
Employee	Enter Employee
Payer	Select Payer
Program	Select Program
Service	Select Service
Category	Select Category
Visit Status	Select Visit Status
Client Medicaid ID	Select Visit Status
Filter Visits By	In Process
Exception Types *	Incomplete
Call Type	Omit
Employee Other ID	Processed
Supervisor	Scheduled
	Verified

“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.

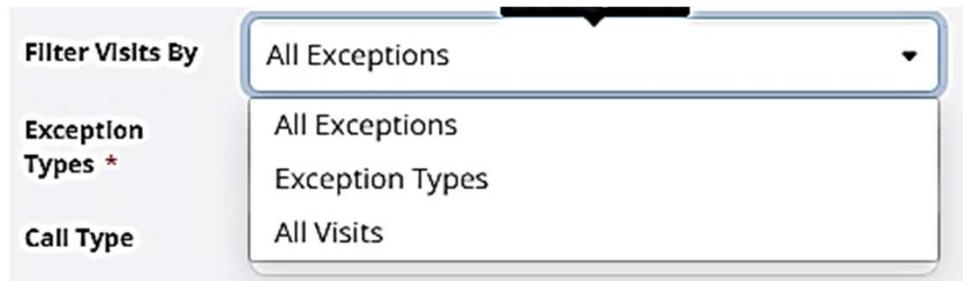
“Verified” will show all the visits that have all the data and require no further action.

“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



The image shows a screenshot of a web interface. On the left, there are three filter categories: 'Filter Visits By', 'Exception Types *', and 'Call Type'. The 'Filter Visits By' category is active, and its dropdown menu is open, showing three options: 'All Exceptions', 'Exception Types', and 'All Visits'. The 'All Exceptions' option is currently selected and highlighted.

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	<input type="checkbox"/>	<input type="checkbox"/>	
Itzen, Sheila	PEMA, SHERPA	Private Duty Nursing - RN/Hour	03/25/2024	12:57 PM			12:57 PM			Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
(516)484-4400			03/08/2024	05:50 AM			05:50 AM			Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
TEST, VOID	Caregiver, Sheila		02/26/2024	10:00 AM	01:00 PM	03:00	10:00 AM	01:00 PM		Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
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.

Filters

From Date * 02/26/2024

To Date * 04/05/2024

Client Enter Client

Employee Enter Employee

Payer Select Payer

Program Select Program

Service Select Service

Category Select Category

Visit Status Select Visit Status

Client Medicaid ID Enter Client Medicaid ID

Filter Visits By All Exceptions

Exception Types * All Exceptions
Exception Types

Call Type All Visits

Employee Other ID Enter Employee Other ID

Supervisors Select Supervisors

Department Select Department

Group Visit Code Enter Group Visit Code

CLEAR APPLY FILTERS

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If you filter visits by All Exceptions

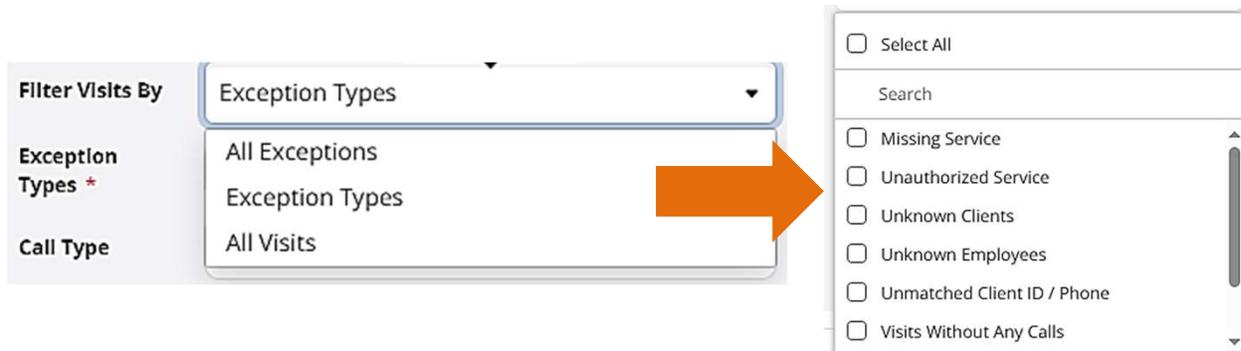
- Visits are displayed containing one or more exception (errors) within the specified date range.

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.



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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	<input type="checkbox"/>		
Itzen, Sheila	PEMA, SHERPA	Private Duty Nursing - RN/Hour	03/25/2024	12:57 PM			12:57 PM			Incomplete	<input type="checkbox"/>		
(516)484-4400			03/08/2024	05:50 AM			05:50 AM			Incomplete	<input type="checkbox"/>		

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**.

The screenshot shows a software interface with three buttons at the top: 'FILTERS', 'SHOW DISPLAY OPTIONS', and 'EXPORT DATA'. An orange arrow points to the 'SHOW DISPLAY OPTIONS' button. Below this, a dialog box titled 'Show Display Options' is open. It contains a list of checkboxes for various data fields, organized into three columns. The first column includes: Adjusted Hours (checked), Adjusted In (checked), Adjusted Out (checked), Approved (unchecked), Call Hours (checked), Call In (checked), Call Out (checked), Claims Verification Status (unchecked), Client ID (unchecked), Client Medicaid ID (unchecked), Client Name (checked), Client Primary Phone Number (unchecked), Client Verified (unchecked), and Do Not Bill (checked). The second column includes: Employee Contact Phone Number (unchecked), Employee ID (unchecked), Employee Name (checked), Employee Other ID (unchecked), Exported (unchecked), Group Visit Code (unchecked), In/ Out Call Location (unchecked), Memo (unchecked), Offline Visit (unchecked), Payer (unchecked), Program (unchecked), Santrax ID (unchecked), Service (checked), and Supervisor (unchecked). The third column includes: Tasks (unchecked), Units (checked), Visit Date (checked), Visit Key (unchecked), and Visit Status (checked). At the bottom left of the dialog is a 'RESET' button, and at the bottom right is a 'SAVE' button, with an orange arrow pointing to it.

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**.

The screenshot shows a software interface with a table of visit information and an Excel spreadsheet. The table has columns for CLIENT NAME, EMPLOYEE NAME, SERVICE, VISIT DATE, and IN/ OUT CALL LOCATION. The 'EXPORT DATA' button is highlighted with an orange arrow. The Excel spreadsheet shows a detailed view of the visit information, including columns for Client Name, Employee Services, Visit Date, In/ Out Call In, Call Out, Call Hours, Adjusted, and Adjusted.

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	IN/ OUT CALL LOCATION
	Caregiver, Amber	Private Duty Nursing - RN/Hour	05/28/2024	Home /
	Caregiver, Amber	Personal Care/Day	05/28/2024	/
Adams, John	Caregiver, Chris	Supportive Home Care/Day	05/23/2024	Community / Community

The Excel spreadsheet shows the following data:

Client Name	Employee Services	Visit Date	In/ Out Call In	Call Out	Call Hours	Adjusted	Adjusted
	Caregiver, Private D	05/28/2024	Home /	01:00 PM		01:00 PM	09:35 AM
	Caregiver, Personal	05/28/2024	/		09:35 AM		09:35 AM
Adams, Jo	Caregiver, Supportiv	05/23/202	Communi	08:00 AM	09:00 AM	01:00	08:00 AM 09:00 AM
McPherso		05/23/202		04:01 PM			04:01 PM
CHAOS, CI	Caregiver, Private D	05/17/202	Home / H	12:00 AM	03:15 AM	03:15	12:00 AM 02:15 AM
CHAOS, CI	Caregiver, Private D	05/17/202	Home / H	03:00 AM	03:15 AM	00:15	03:00 AM 03:15 AM
CHAOS, CI	Caregiver, Private D	05/17/202	Home / H	02:06 PM	02:42 PM	00:36	02:06 PM 02:42 PM
CHAOS, CI	Caregiver, Private D	05/17/202	Home / H	02:24 PM	03:14 PM	00:50	02:24 PM 03:14 PM
CHAOS, CI	Caregiver, Mechanic	05/13/202	Home / H	03:56 PM	04:03 PM	00:07	03:56 PM 04:03 PM

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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.

Show Legend 

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	IN/ OUT CALL LOCATION	CALL IN	CALL OUT
	Caregiver, Amber	Private Duty Nursing - RN/Hour 	05/28/2024	Home /	01:00 PM	
	Caregiver, Amber	Personal Care/Day 	05/28/2024	/		09:30 AM
Adams, John	Caregiver, Chris	Supportive Home Care/Day 	05/23/2024 	Community / Community	08:00 AM	09:00 AM
McPherson,			05/23/2024		04:01 PM	

Legend

Highlight colors

-  Exception
-  Multiple Client with the same phone
-  Visit Created Manually
-  Task(s) Exist for Visit
-  FVV Device Indicator

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 second row's 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
	Y C	•	08/14/2017	•	2:47 PM				
	Y C	•	08/14/2017	•	2:46 PM				
	000-44-6258	•	08/14/2017	•					

Exceptions:
Visits
without in-
calls

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When you hover your cursor over the exception, a message will describe it.

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

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:

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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.

← BACK Visit From Date: 02/21/2024
Client ID#: 898700 | Client Name: TESTCLIENT, FFSREGRESSION | Medicaid ID#: 222112221 | Employee ID#: 850215 | Employee Name: Test, John

General Client Employee Call Log Tasks Exceptions GPS Memo Claims History

Visit From Date 02/21/2024	Visit To Date 02/21/2024	Visit Time Zone US/Central	Visit Status Incomplete
Call In 01:00 PM	Call Out 03:00 PM	Call Hours 02:00	
Adjusted In Date 02/21/2024	Adjusted In 01:00 PM	Adjusted Out Date 02/21/2024	Adjusted Out 03:00 PM
Agency ID 91031	Agency Name MOM HOME HEALTH AND PC - CROP	Service Unspecified Therapeutic Procedure - OT/...	Group Visit Code
Payer WIFS	Program FFS	Client Verified Time No	Client Verified Service No
Client Verified Time No	Client Verified Service No	Client Signature No	Offline Visit N/A
Visit Source UAT VendorTest			
Do Not Bill <input type="checkbox"/>	Approved <input type="checkbox"/>		GENERATE GROUP VISIT CODE

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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**.

The screenshot shows a web form with the following fields and values:

- Payer:** WIFFS
- Program:** FFS
- Service:** Personal Care Svc/15min
- Group Visit Code:** (empty)
- Client Verified Time:** No
- Client Verified Service:** No
- Client Signature:** No
- Offline Visit:** N/A
- Visit Source:** UAT VendorTest
- Do Not Bill:** (checkbox, unchecked)
- Approved:** (checkbox, unchecked)
- Reason Code *:** Select Reason Code
- Resolution Code *:** Select Resolution Code
- Reason Note:** Enter Reason Note

Buttons: GENERATE GROUP VISIT CODE, SAVE. A large orange arrow points to the SAVE button.

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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.

* indicates required field

Reason Code *

Resolution Code *

Reason Note

SAVE

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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

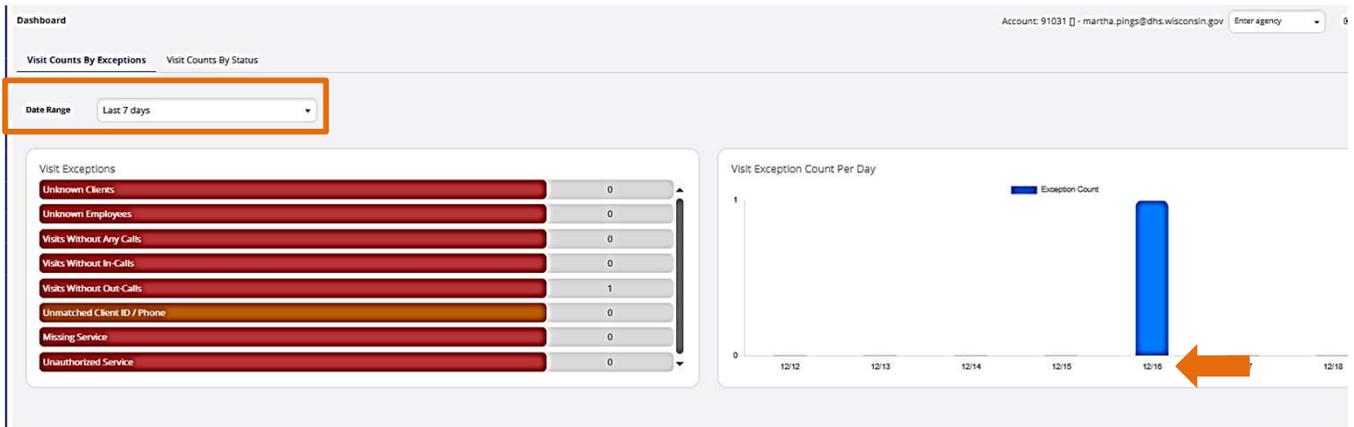
The table here shows the list of drop-down reason codes.

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

Now that we've gotten acquainted with the basics of visit maintenance, let's take a fresh look at another tool: the dashboard.

Sandata EVV Portal Dashboard



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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

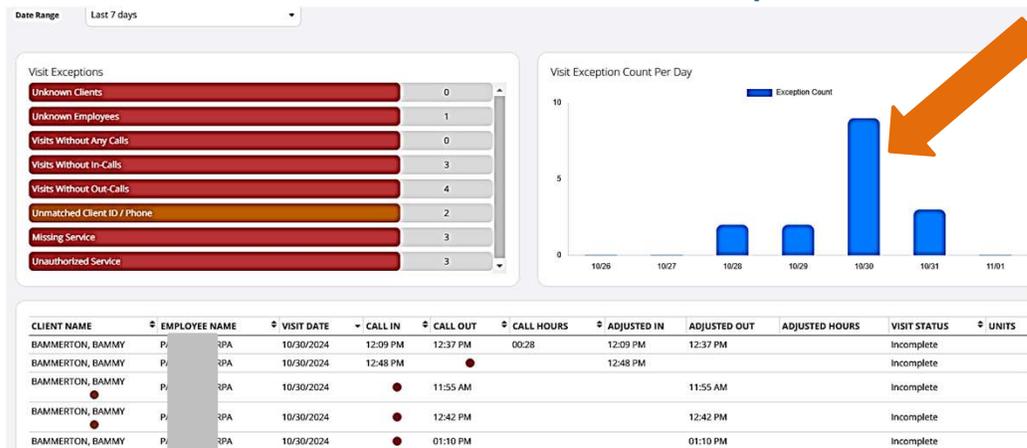


You can also choose the Visit Counts By Status tab at the top. After you choose a date range within the calendar month, the blue Visit Status bar will show how many visits are in each status. Click on a blue bar on the left, and you'll see a date summary on the right side of the screen. Here we've chosen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



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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.

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

Home » Partners & Providers » Electronic Visit Verification » Electronic Visit Verification (EVV)

EVV: Home

What's New

Members

IRIS

Providers and Independent Nurses

Payers

Alternate EVV

Training

Resources and FAQs

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 vdxc.con@ctdvw@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

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 vdxc.con@ctdvw@wisconsin.gov Monday-Friday, 7 a.m.-6 p.m. Central Time.

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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.

