

# Visit Maintenance: Correcting Unmatched Client Phone/ID Exceptions



P-02745E (01/2025)

This is for administrators focused on correcting an unmatched client phone/ID 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](http://www.dhs.wisconsin.gov/evv/training-administrators.htm)



# 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.

- 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	<input type="checkbox"/>	<input type="checkbox"/>	

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.

 Unmatched Client ID / Phone	<input checked="checked" type="checkbox"/> ACKNOWLEDGE THIS EXCEPTION
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4

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**.

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

- Payer:** WIFFS (dropdown)
- Program:** FFS (dropdown)
- Service:** Personal Care Svc/15min (dropdown, highlighted with an orange box)
- Group Visit Code:** (empty field)
- Client Verified Time:** No (dropdown)
- Client Verified Service:** No (dropdown)
- Client Signature:** No (dropdown)
- Offline Visit:** N/A (dropdown)
- Visit Source:** UAT VendorTest (dropdown)
- Do Not Bill:** (checkbox, unchecked)
- Approved:** (checkbox, unchecked)
- GENERATE GROUP VISIT CODE:** (button)
- Reason Code \*** (dropdown, highlighted with an orange box)
- Resolution Code \*** (dropdown, highlighted with an orange box)
- Reason Note:** Enter Reason Note (text area)
- SAVE:** (button, indicated by an orange arrow)

Below the Reason Code and Resolution Code dropdowns, there is a red error message: "Reason Code is required."

5

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.

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.

7

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](http://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](http://www.dhs.wisconsin.gov/evv/training-administrators.htm)

9

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](http://www.dhs.wisconsin.gov/evv/training-administrators.htm)

# 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](http://www.dhs.wisconsin.gov/evv/index.htm)

WISCONSIN DEPARTMENT of HEALTH SERVICES

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

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](mailto: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, email 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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11

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](http://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](http://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](http://www.dhs.wisconsin.gov/evv/resources.htm)

# Thank You

Thank you for the important services you provide to members.



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