Visit Maintenance: Correcting Unmatched Client Phone/ID Exceptions



P-02745E (01/2025)

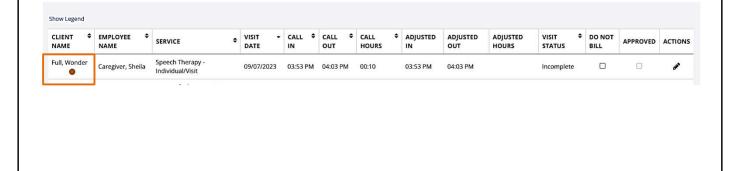
This is for administrators focused on correcting an unmatched client phone/ID exception. For more info about all visit maintenance functions in the Sandata EVV Portal, see the "Visit maintenance and clearing exceptions in Sandata" section of www.dhs.wisconsin.gov/evv/training-administrators.htm

- 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.

Click the exception dot under the Client Name column.

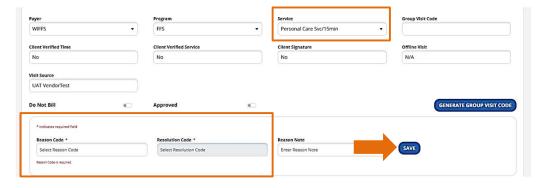


As with other exception dots, we'll click on it to select it.

Unmatched Client ID/Phone Click on the Acknowledge This Exception checkbox on the Unmatched Client ID/Phone exception line. Onmatched Client ID / Phone ACKNOWLEDGE THIS EXCEPTION

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.

- 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.

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.

- Help clients keep address and phone number information upto-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.

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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.

- 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.

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

- IRIS consultant
- IRIS Consultant Agency
- IRIS Call Center

 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:

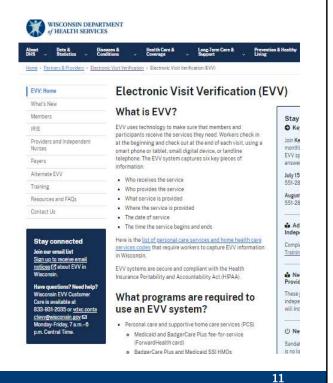
www.dhs.wisconsin.gov/evv/training-administrators.htm



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



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.

