

Visit Maintenance: Correcting Missing Call In or Call Out Exceptions with Merge Calls

This is for administrators focused on correcting a visit with a missing call in or call out exception using the merge call feature. 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 a Visit with a Missing Call in or Call out Exceptions

Let's talk about how to correct visits with missing call in or call out exceptions.

Visit Without Check In/Check Out

This exception shows a visit that does not have either a call in or call out time.

- Sandata refers to “call in” and “call out” for all methods: SMC, TVV, FVV, or manually entered.
- Administrators should try the Merge Call function first. If that is not an option, the missing call time can be added.

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The “visit without call in/call out” exception shows a visit that does not have either a call in or call out time. Don’t let the word “call” limit your thinking. Sandata refers to “call in” and “call out” for all methods: SMC, TVV, FVV, or visits that are manually entered on the Sandata EVV portal.

There are two ways to handle this exception:

1. Administrators should try the Merge Call function first.
2. If that is not an option, the missing call time can be added.

We’ll go over each of these options.

Visit Without Check In/Check Out

Tips for preventing missing call in/call out exceptions:

- Train employees on the importance of using EVV for both the call in and call out times.
- Note trends in the employee's use of EVV and offer additional training if needed.
- Set goals with each employee to improve their EVV use. Help them use reminders, such as a cell phone alert, timer bell, or co-worker reminder.

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Merging Calls

Now let's talk about the first possibility to take care of a missing call in or out: merging calls.

Merging Calls

The **Merge Calls** option in Visit Details will display if the system shows several incomplete calls that may be able to merge to provide one complete visit. The incomplete calls have overlapping information, including:

- Same employee ID
- Same date of service
- Same client

Merging calls is a clever way the Sandata system has of correcting some exceptions.

The Merge Calls option will display only if the system shows several incomplete calls that could merge to provide one complete visit. The incomplete calls have overlapping information, including:

- Same employee ID
- Same date of service
- Same client

Let's go through an example.

Merging Calls

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	VISIT STATUS	DO NOT BILL
Jackson, Cedrick	So [REDACTED] ni	Speech Therapy - Individual/Visit	09/28/2023	●	03:15 PM	Incomplete	<input type="checkbox"/>
Jackson, Cedrick	So [REDACTED] ni	●	09/28/2023	12:57 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	02:31 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	02:32 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	02:33 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	02:33 PM	●	Incomplete	<input type="checkbox"/>
Jackson, Cedrick	So [REDACTED] ni	●	09/28/2023	02:34 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	03:11 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	03:14 PM	●	Incomplete	<input type="checkbox"/>
(6 [REDACTED] 68	●	●	09/28/2023	03:19 PM	●	Incomplete	<input type="checkbox"/>

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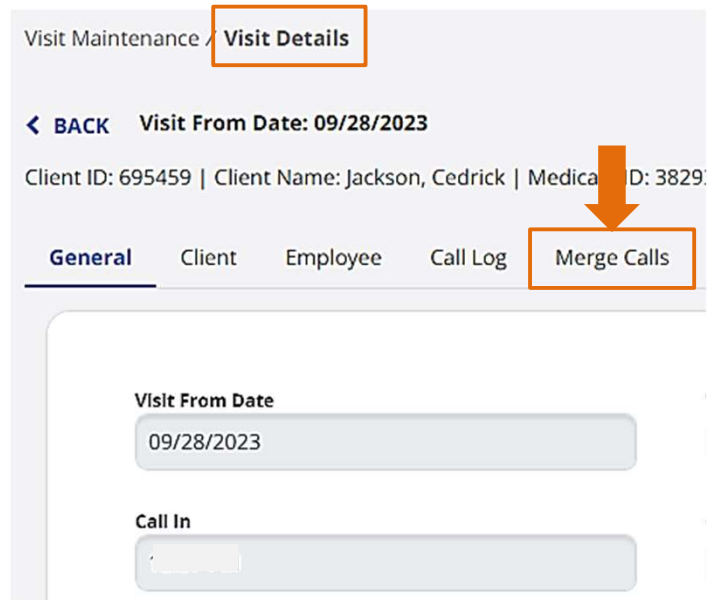
Here we have several incomplete visits. They were all made in a short timeframe—the afternoon of September 28. Some are missing a call in, and some are missing a call out. Can any of these be merged? Let’s find out.

Since the top row has the most information, we’ll start there.

As usual, select (click on) the row to open the Visit Details screen for edits. We’ll be looking to combine the 2:34 p.m. “Call In” line to go with the 3:15 p.m. “Call Out” time.

Merging Calls

Click **Merge Calls** tab to view other calls that can be merged to the visit.



The screenshot shows the 'Visit Details' screen in a software application. At the top, there's a breadcrumb 'Visit Maintenance / Visit Details' where 'Visit Details' is highlighted with an orange box. Below this is a navigation bar with a '< BACK' link and 'Visit From Date: 09/28/2023'. The client information is displayed as 'Client ID: 695459 | Client Name: Jackson, Cedrick | Medical ID: 3829'. A tabbed interface below has four tabs: 'General', 'Client', 'Employee', and 'Call Log'. The 'Merge Calls' tab is highlighted with an orange box, and a large orange arrow points down to it from the client information area. Below the tabs, the 'Visit From Date' is shown as '09/28/2023' in a text field, and the 'Call In' field is partially visible below it.

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When the Visit Details screen opens, you see the “Merge Calls” tab is available to use. That’s good news, because it may offer us an easy way to get the rest of the visit information we need. If it isn’t there, a merge isn’t possible.

Click on the Merge Calls tab to view other calls that might complete the information here.

Select the row.


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Once you're sure these details are accurate for the visit, select the circle next to the row to merge it.

Merging Calls

- From the drop-down menu, click the **reason code** and **resolution code**.
- Enter a **reason note** if needed.
- **Save**.

* indicates required field

Reason Code * <input type="text" value="Select Reason Code"/> <small>Reason Code is required.</small>	Resolution Code * <input type="text" value="Select Resolution Code"/>	Reason Note <input type="text" value="Enter Reason Note"/>	 SAVE
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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.

Merging Calls

The two rows of information are merged to one row.

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	VISIT STATUS	DO NOT BILL			
Jackson, Cedrick	So [REDACTED] ni	Speech Therapy - Individual/Visit	09/28/2023	02:34 PM	03:15 PM	00:41	02:34 PM	03:15 PM	Incomplete	<input type="checkbox"/>
(631) 888-8858			09/28/2023	02:31 PM			02:31 PM		Incomplete	<input type="checkbox"/>
(631) 888-8858			09/28/2023	02:32 PM			02:32 PM		Incomplete	<input type="checkbox"/>
(631) 888-8858			09/28/2023	02:33 PM			02:33 PM		Incomplete	<input type="checkbox"/>
(631) 888-8858			09/28/2023	02:33 PM			02:33 PM		Incomplete	<input type="checkbox"/>
(631) 888-8858			09/28/2023	03:11 PM			03:11 PM		Incomplete	<input type="checkbox"/>
(631) 888-8858			09/28/2023	03:14 PM			03:14 PM		Incomplete	<input type="checkbox"/>
(631) 888-8858			09/28/2023	03:19 PM			03:19 PM		Incomplete	<input type="checkbox"/>

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We can go back to view the row for the visit we edited and see the information we merged is now included.

The row from below that used to only have a 2:34 “call in” time is no longer in the list, because the information from it merged with that top row.

Success!

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

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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 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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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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