

Visit Maintenance: Client Signature, Notes, and Tasks for Record of Care



P-02745J (01/2025)

This is for administrators focused on using EVV with client signature, notes, and tasks for Record of Care. 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

Client Signature, Notes, and Tasks for Record of Care

These items will not prevent a visit from reaching a “verified” status. You can view the client signature, notes, and tasks for use in a client’s Record of Care in the Sandata EVV Portal.

Client Verification, Notes, and Tasks

- Fee-for-service personal care providers may choose to use the Sandata EVV portal to capture all elements of the record of care for T1019 personal care services.
- Personal care providers should check with their HMOs, MCOs, or IRIS FEA regarding documentation requirements.
- Home health care service providers do not need to capture record of care within EVV.

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- Fee-for-service personal care providers may choose to use the Sandata EVV portal to capture all elements of the record of care for T1019 personal care services.
- Personal care providers should check with their HMOs, MCOs, or IRIS FEA regarding documentation requirements.
- For home health care providers: Capturing client verification, notes, and tasks within the Sandata EVV app is not required for home health care service providers.

Client Verification, Notes, and Tasks

- If any part of the record of care is missing from the Sandata EVV portal, it will not set a visit exception.
- Providers can monitor record of care data collection using the Sandata **Employee Visit Log** date range report.

Report Parameters
Account: MOM HOME HEALTH AND PC - CROP (0103)
For: 12/1/2023 - 12/31/2023 11:55:59 PM

EMPLOYEE VISIT LOG

PAYER: CAREWI		VISIT				LOCATION IN		LOCATION OUT		EMPLOYEE			CLIENT				
PRG	VISIT KEY	DATE	TIME IN	TIME OUT	HOURS	STATUS	LATITUDE LONGITUDE	PHONE #	LATITUDE LONGITUDE	PHONE #	NAME	EMPLOYEE ID	SANTRAX ID	NAME	ID / MEDICAID	SG	OFFLINE VISIT
WHMO	2159144788	12/29/2023	1:09 PM	1:17 PM	0.15	Verified		303		303	PASANO, SHERPA	100006156	100006156	Mc	87 1001	N	N/A
HCPCS:		99504															
Task Line:		0100															
					Total Hours:	0.15											
					Grand Total Hours:	0.15											

Note: Report is limited to Verified Visits only. Visits with remaining exceptions in an Incomplete status are not included.

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If any part of the record of care is missing from the Sandata EVV portal, it will not create an exception.

Therefore, the best way to monitor record of care data collection is using the Sandata Employee Visit Log date range report. This report was created specifically for Wisconsin's personal care providers. You can easily see which visits have the tasks, notes, and client verification using this report.

Client Verification, Notes, and Tasks

In Visit Maintenance, use **Show Display Options** to view Client Verified, Memo, and Tasks columns for visits.

Filters: **SHOW DISPLAY OPTIONS** Export Data

Show Display Options

- Adjusted Hours
- Adjusted In
- Adjusted Out
- Approved
- Call Hours
- Call In
- Call Out
- Claims Verification Status
- Client ID
- Client Medicaid ID
- Client Name
- Client Primary Phone Number
- Client Verified
- Do Not Bill
- Employee Contact Phone Number
- Employee ID
- Employee Name
- Employee Other ID
- Exported
- Group Visit Code
- In-Out Call Location
- Memo
- Offline Visit
- Payer
- Program
- Santrax ID
- Service
- Supervisor
- Tasks
- Units
- Visit Date
- Visit Status

RESET

In addition to the Employee Visit Log report, in Visit Maintenance you can choose “Show Display Options” to add Client Verified, Memo, and Tasks columns to view in a list of visits

Client Verification, Notes, and Tasks

- **Export Data** to save to your computer.
- Click on a row to see more details.



FILTERS SHOW DISPLAY OPTIONS EXPORT DATA

Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	CALL IN	CALL OUT	TASKS	VISIT STATUS	MEMO	CLIENT VERIFIED	ACTIONS
Chris, WIMember	Austin, T	Personal Care Svc/15min	04/11/2023		01:52 PM	3	Verified	Emp...	Y	
BILLS, RICK	Austin, T	Supportive Home Care/15min	11/22/2022	12:01 PM	12:06 PM	1	Incomplete		Y	
Tester, Helen	Austin, T	Personal Care/Day	11/23/2022		11:23 AM	1	Incomplete		Y	
	Austin, T	Personal Care/Day	10/10/2022		04:39 PM	1	Incomplete		Y	
Ace, WIMember	Caregiver, Carrie	Personal Care Svc/15min	04/11/2023	01:00 AM	02:00 AM	0	Verified		N	
Ace, WIMember	SHERPA, DIL	Personal Care Svc/15min	04/11/2023	01:00 AM	03:00 AM	0	Verified		N	

Use the “Export Data” button to save the information to your computer as a CSV or Excel file.

As usual, to see more details of the visit, click on the row.

Client Verification, Notes, and Tasks

Use the “General” tab to view client verification information.

The screenshot displays a software interface with a navigation bar at the top containing tabs: General, Client, Employee, Call Log, Tasks, Exceptions, GPS, Memo, Claims, and History. The 'General' tab is selected and highlighted with an orange border. Below the navigation bar, the form is organized into a grid of input fields. The fields are as follows:

Visit From Date None	Visit To Date 04/11/2023	Visit Time Zone US/Central	Visit Status Verified
Call In None	Call Out 01:52 PM	Call Hours None	
Adjusted In Date 04/11/2023	Adjusted In 08:03 AM	Adjusted Out Date 04/11/2023	Adjusted Out 01:52 PM
Agency ID 91030	Agency Name LAMA SHERPA		
Payer Select Payer	Program Select Program	Service Select Service	Group Visit Code
Client Verified Time Yes	Client Verified Service Yes	Client Signature Yes	Offline Visit No

The 'Client Verified Time', 'Client Verified Service', and 'Client Signature' fields are highlighted with an orange border. The number '7' is visible in the bottom right corner of the interface.

In the Visit Details screen for that row, use the “General” tab to view client verification information. The fields are grayed out, showing they are read-only and cannot be changed.

Client Verification, Notes, and Tasks

Use the “Tasks” tab view or edit the tasks.

TASK ID	DESCRIPTION	READING	MANUALLY ADDED	STATUS	SELECT TASK
0135	Toileting	<input type="text"/>	No	Completed	<input checked="" type="checkbox"/>
0305	Housekeeping	<input type="text"/>	No	Completed	<input checked="" type="checkbox"/>
0310	Laundry as needed	<input type="text"/>	No	Completed	<input checked="" type="checkbox"/>
0200	Bowel Program Medically Oriented Tasks	<input type="text"/>			<input type="checkbox"/>
0205	Catheter Site Care Medically Oriented Tasks	<input type="text"/>			<input type="checkbox"/>
0210	Complex Positioning Medically Oriented Tasks	<input type="text"/>			<input type="checkbox"/>
0105	Dressing-Changing	<input type="text"/>			<input type="checkbox"/>
0120	Eating Assistance	<input type="text"/>			<input type="checkbox"/>
0300	Eyeglass-Hearing Aids Care	<input type="text"/>			<input type="checkbox"/>
0215	Feeding Tube Site Care Medically Oriented Tasks	<input type="text"/>			<input type="checkbox"/>

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Use the “Tasks” tab to view or edit the tasks. Click the button in the “Select Task” column on the right to add or remove any tasks. If edits are made, the Reason Code and Resolution Code fields will show at the bottom for you to complete.

Select the resolution code, Written Documentation Maintained. (A reminder: Make sure you have this documentation.)

Client Verification, Notes, and Tasks

Use the “Memo” tab view notes or add a memo.

General Client Employee Call Log Tasks Exceptions GPS **Memo** Claims History

MEMO

Employee (Terry) called office later with note that the client (Chris) did not want to eat lunch.

926 characters remaining.

SAVE

VISIT NOTE

testing with manual auth created and then auth via feed

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Use the “Memo” tab to view notes entered during the visit. While visit notes (on the bottom) are grayed out and cannot be edited, the “Memo” field (on the top) can be used. Click “Save” if a memo is added.

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

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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 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.

