Visit Maintenance: Omit Status

WISCONSIN DEPARTMENT
of HEALTH SERVICES

This is for administrators focused on the "Omit" status. 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

Omit Status

One of the tools to introduce to you is setting a visit line's status to "Omit." Here is how that status comes about.

Omit Status

Visit information is never deleted from the Sandata EVV portal. Calls that are accidental or not needed can be set apart from regular view by assigning an "Omit" status to them. This is useful for:

- Robocalls
- Practice calls during training
- Duplicate manual visits created in error

Visit information is never deleted from the Sandata EVV portal. Calls that are accidental or not needed can be set apart from regular view by assigning an "Omit" status to them. This is useful for calls that you'd not want to bring to a verified status or pass along to a payer. For example:
•Robocalls
•Practice calls during training
•Duplicate manual visits created in error

Omit Status

Robocalls may come into the TVV toll-free number.
- No employee and client information
- No call out
- No service code

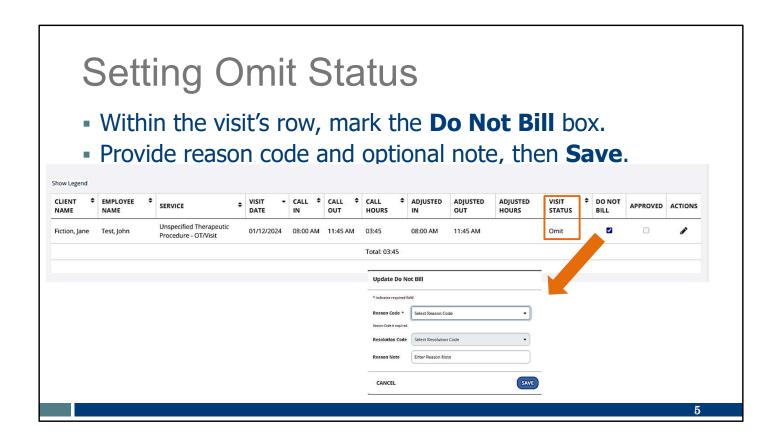Practice calls are helpful during training but risk being mistaken for actual visits.

Sometimes you may notice visits with exceptions almost all the way across. These may be from robocalls to the TVV line. Robocalls can happen to a TVV toll-free phone line just as they do to our personal phone lines. You can identify robocalls because there's no information entered, only a time and date in.
- No employee and client information
- No call out
- No service code

Providing hands-on experience with the SMC app, TVV, or even FVV is a great training technique. They will result in visit information within the Sandata EVV portal, however.

Assigning an "Omit" status is a good way to set these types of calls aside so they don't appear as exceptions needing to be handled or calls that may be sent to payers.

Setting Omit Status

- Within the visit's row, mark the **Do Not Bill** box.
- Provide reason code and optional note, then **Save**.

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
Fiction, Jane	Test, John	Unspecified Therapeutic Procedure - OT/Visit	01/12/2024	08:00 AM	11:45 AM	03:45	08:00 AM	11:45 AM		Omit	☑	☐	✏
						Total: 03:45							

Update Do Not Bill

* indicates required field

Reason Code *   Select Reason Code ▾
Reason Code is required.

Resolution Code   Select Resolution Code ▾

Reason Note   Enter Reason Note

CANCEL   SAVE

A helpful way to set these calls aside is to check the "Do not bill" box within the row. This is a confusing title, since the DHS-provided Sandata system does not include billing. It does what it needs to, however: it separates or omits these unwanted visits from the list of actual visits. Note that the "Visit Status" column now shows "Omit," since the "Do Not Bill" box is marked.
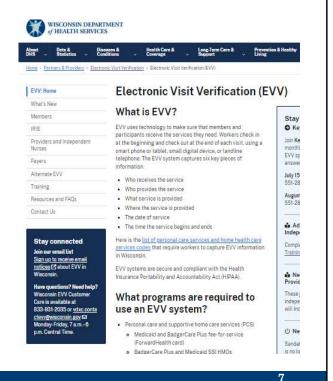
The pop-up box seen here will display when you mark the "Do Not Bill" box. Fill out the required reason code, a note if you'd like, and save.

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

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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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