

Visit Maintenance: Correcting Missing Call In or Call Out Exceptions by Adding a Manual Call



P-02754M (01/2025)

This is for administrators focused on correcting a visit with a missing call in or call out exception by adding a manual call. 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

Adding a Manual Call

Let's look at how to correct visits with missing call in or call out exceptions by adding a manual call.

Add Manual Call

Difference between Create Call, Manual Call, and Create Visit in Sandata's portal:

- **Create Call** has limited use. It is used when a visit is in progress, and *only an in call* needs to be created to start a visit.
- **Manual Call** is used when a visit exists in the past but is missing a single call in or call out time.
- **Create Visit** is used when an entire visit needs to be created, from start to finish.

3

What's the difference between Create Call, Manual Call., and Create Visit?

- **Create Call** has limited use. It is used when a visit is in progress, and only an in call needs to be created. Maybe the employee called the provider at the start of the visit because they could not use the usual check in method.
- **Manual Call** is used when a visit exists in the past but is missing a single call in or call out time. You might be able to merge with another incomplete visit, or you may need to add a single in or out time. This is what we'll be covering in this section of slides.
- **Create Visit** is used when an entire visit needs to be created, from start to finish (see next section).

Add Manual Call

- Check for the Merge Calls tab before adding a call in or out.
- Verify the missing call in or out time with the employee.
- Add a manual call if a visit is missing a call in or call out time.

4

- Check for the Merge Calls tab before adding a call in or out. We've just seen what a timesaver this can be. Use it when you can.
- Verify the missing call in or out time with the employee.
- If a merge option isn't available, edit to include the missing time. This is what Sandata means by "a manual call."

Let's look at an example.

Add Manual Call

Click on the row to select the visit.

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
It. [redacted] ila	PEMA, SHERPA	Private Duty Nursing - RN/Hour	03/25/2024	12:57 PM	●		12:57 PM			Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	

As usual: you will click the row to select the visit. Here, the call is missing a call out.

Add Manual Call

- Enter the missing call information.
- Select a **reason code** and **resolution code** from the drop-down menus.
- Click **Save**.

Client ID#: 264471 | Client Name: Itzen, Sheila | Medicaid ID#: 789556611 | Employee ID#: 10006155 | Employee Name: PEMA, SHERPA

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

Call Log Information Section

Call In		Call Time	12:57 PM	Call Type	MVV (Mobile, GPS)	Service	Private Duty Nursing - RN/4our
Call Date	03/25/2024	Latitude	46.1 [redacted]	Longitude	-91.1 [redacted]	Call Source	UAT VendorTest
User	sheila@ [redacted].com	Time Zone	America/Chicago	Offline Visit	No		

Add Manual Call

* indicates required field

Call Date MM/DD/YYYY *

Call Time HH:MM AM/PM *

Service

Time Zone

Required

* indicates required field

Reason Code *

Resolution Code

Reason Note



6

In this example, a Merge Call tab does not appear near the top. There aren't any calls that the system thinks could complete this one, so we'll ask the employee or client for the details and enter them here.

Then as we've seen before:

- 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.

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

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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 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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8

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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