

Sandata Electronic Visit Verification Portal Reports



P-02756 (01/2025)

Welcome to the training for Sandata Electronic Visit Verification Portal Reports.

Agenda

- Report overview
- How to run a report
- How to navigate reports
- Review available reports

The Reports module on the Sandata EVV portal gives you a lot of options. Today, we'll cover:

- Report overview
- How to run a report
- How to navigate reports
- Review available reports

Make note of what might work in your business practices: What kind of summary information will be helpful to you, and how often?

A reminder that since these are on the Sandata EVV Portal, they are accessed by administrative staff. Independent nurses, your learning here will be your in administrative role.

Report Overview

Let's start with the Report Overview.

Report Overview

- The user's security role determines what reports are available to the user.
- Different reports support monitoring visits in the field to ensure that clients are receiving the services as expected and can help to identify employees' training needs.
- The Employee Visit Log can be used for fee for service T1019 record of care.

The user's security role determines what reports are available to the user. For example, an assistant coordinator will not be able to access as many kinds of reports as the security admin.

The different reports support monitoring visits in the field to ensure that clients are receiving the services as expected. There are reports that summarize when authorizations expire, for example.

Reports can help identify employees' training needs. Some reports can help see if an employee's visits keep resulting in the same exceptions. From there, retraining could take place.

The Employee Visit Log can be used for fee for service T1019 record of care.

Report Overview

- Reports can be filtered to highlight information.
- Reports referencing claims and scheduling will not provide any results.
 - These functions are not part of the Department of Health Services EVV solution.
 - Claims and scheduling reports will not be covered in this training.

Reports can be filtered to highlight information. If you have someone on your team with good Excel familiarity, bring them in! If you need to brush up on Excel, there are free tutorials available online.

Reports referencing claims and scheduling will not provide any results. Claims and scheduling reports will not be covered in this training, since are not part of the Wisconsin DHS-provided EVV solution.

Report Overview

Visit Maintenance can be customized like a report to show the information desired.

The information can be exported.



The screenshot shows the Sandata 'Manage Visits' interface. On the left is a navigation menu with options like 'Navigate Modules', 'Dashboard', 'Clients', 'Employees', 'Visit Maintenance', and 'Reports'. The main area has 'CREATE VISIT' and 'CREATE CALL' buttons. In the top right, there are 'FILTERS', 'SHOW DISPLAY OPTIONS', and 'EXPORT DATA' buttons, with three orange arrows pointing to them. Below these is a table with columns for 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, and Actions. Two rows of visit data are visible.

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
Foundations, Sample	Caregiver, Martha	PCS Nurse Supervisory Visit/Visit	06/18/2024	08:00 AM	02:00 PM	06:00	08:00 AM	02:00 PM		Verified	<input type="checkbox"/>	<input type="checkbox"/>	
Adams, John	Burghed, Zain	Personal Care/Day	06/12/2024	04:00 AM	06:00 AM	02:00	04:00 AM	06:00 AM		Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	

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Sandata offers a wide variety of reports that we'll look at later. However, if the information you're looking for isn't found in any of Sandata's pre-set reports, you may be able to set up the Visit Maintenance screen to get the information you'd like and export it for your use. In the upper right corner:

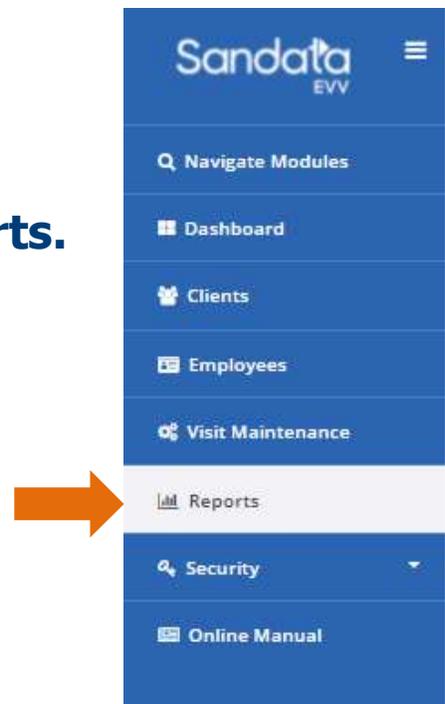
- Use the Filter button to set up the boundaries—for example, the date range, payer, service code, or visit status.
- Select Show Display Option to choose the information to display as columns. There are over 30 options to choose from. The fewer columns you have, the easier it will be to see all the information on your computer screen.
- Select Export Data if you'd like it as a CSV or Excel file to save elsewhere, share, or use the data in other ways.

How to Run a Report

Let's move to how a provider would run a report in the Sandata EVV Portal.

How to Run a Report

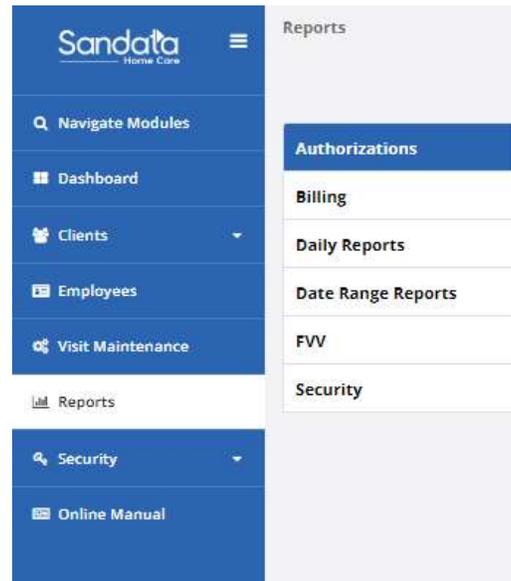
From the navigation panel, click **Reports**.



From the navigation panel, click Reports.

How to Run a Report

- This page is broken up into Report types:
 - Authorizations
 - Billing (not used in Wisconsin)
 - Daily Reports
 - Date Range Reports
 - FVV
 - Security



This page is broken up into report sections:

- Authorizations
- Billing (not used in Wisconsin)
- Daily Reports
- Date Range Reports
- FVV
- Security

The reports types have drop-down menus to show the reports available. We will break down each of these sections over the next few slides.

How to Run a Report

Each section offers different reports tailored to that specific topic. Select the desired report.

For example, Authorizations includes:

- Authorizations vs Actual Used by Client
- Authorizations
- Clients without Authorizations
- Expiring Authorizations

Authorizations

Authorization vs Actual Used by Client

Authorizations

Clients Without Authorizations

Expiring Authorizations

As an example, the first section is the Authorizations which offers four different reports.

Authorizations vs Actual Used by Client

Authorizations

Clients without Authorizations

Expiring Authorizations

How to Run a Report

- Refine the results by using **Filters**.
- Click **Run Report**.

Filters [X]

Note: The range for this report cannot exceed 730 days.

From Date * 04/15/2024 [Calendar icon]

To Date * 04/15/2024 [Calendar icon]

From Time * 12:00 AM [Clock icon]

To Time * 11:59 PM [Clock icon]

Payers Select Payers [Dropdown arrow]

Programs Select Programs [Dropdown arrow]

Services Select Services [Dropdown arrow]

Client Enter Client [Text input]

Client Medicaid ID Enter Client Medicaid ID [Text input]

CLEAR [Button] RUN REPORT [Button]

Next, select your filters. You can make as many or as few selections in these fields as you'd like. Common fields include Payer, Program, Client, and Client Medicaid ID.

Using filters narrows results to the specific data desired. It reduces the size of the report, too, which can make it quicker to run. When running reports with longer date ranges or containing lots of data, consider adding one or more filters.

Use "Clear" to refresh the filter and start over. When you're ready, click Run Report.

How to Run a Report

The **Preview Report** screen is displayed.

← GO BACK

For an accessible version of this report, click "EXPORT TO EXCEL" to open report in Excel. **EXPORT TO EXCEL**

1 of 1 Find | Next

ACTIVE CLIENTS

Report Parameters
Account: Training Account 4 (91102)
For: 10/22/2021 - 10/22/2021 11:59:59 PM

Account: Training Account 4 (91102)
Provider ID: 999991718

CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	ADDRESS	CITY	ST	ZIP	LATITUDE	LONGITUDE	CLIENT ALTERNATE ID
119010	*****		(555)222-9876	123 Main Street	MILWAUKEE	WI	53212-0000	43.07327150	-87.90896230	
199272	*****		(999)555-1212	2117 HUEBBE PKWY	Beloit	WI	53511-0000	42.54996580	-89.00461880	****
413200	*****		(555)222-9876	123 Main Street	MILWAUKEE	WI	53212-0000	43.07327150	-87.90896230	
414764	*****		(555)222-9876	123 Main Street	MILWAUKEE	WI	53212-0000	43.07327150	-87.90896230	*****

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The information will display as a preview report screen.

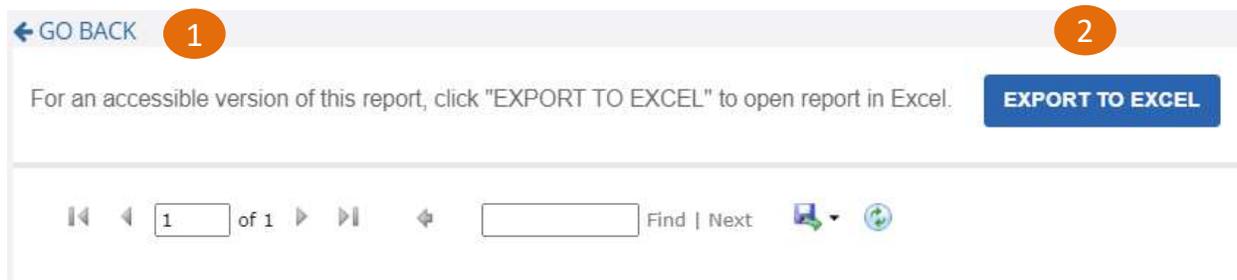
The report filters in top right corner of the report will show on every report. It's a great tool to use if you feel data didn't pull to your report that you thought should. You can check the filters you chose without having to exit the report.

(Note: Information displayed in our PowerPoints is not from real members/participants.)

How to Navigate a Report

Next, we'll go over How to Navigate a Report.

How to Navigate a Report



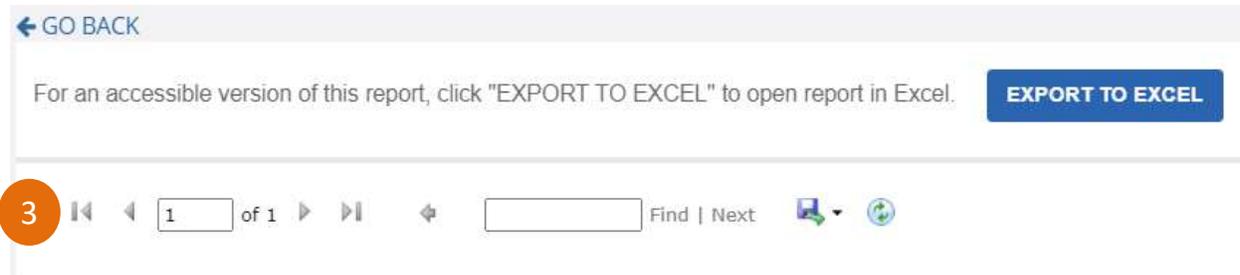
1. The **Go Back** link closes the Preview Report screen and returns to the search parameters.
2. The **Export to Excel** button provides a Microsoft Excel version of the report for users to further sort and filter for their needs.

On the preview screen, there are some tools:

1. The **Go Back** link closes the Preview Report screen and returns to the search parameters you can re-set the parameters and try again.
2. The **Export to Excel** button provides a Microsoft Excel version of the report for users to further sort and filter for their needs.

You'll also notice at the top, next to the "Export to Excel" button: Accessible version means exporting to another format to further sort/filter/calculate to own preferences.

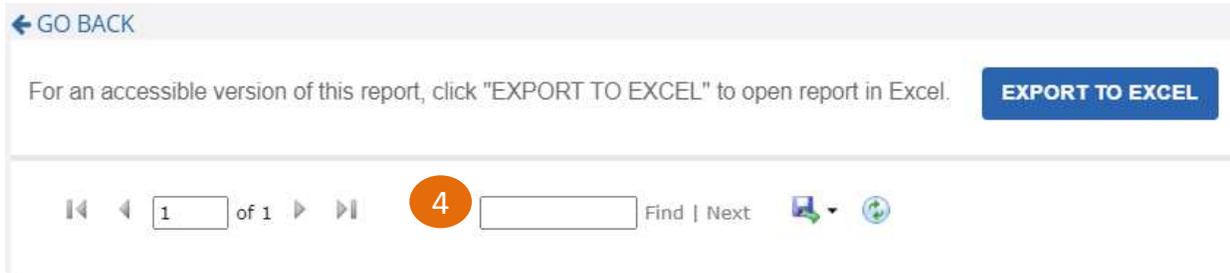
How to Navigate a Report



3. Navigate to a specific page by typing a number into the current page field and pressing <Enter>.

3. Page Navigation will display the current page versus the total number of pages. The arrows can be used to navigate to the first, previous, next, or last page. To go to a specific page number, type the number in and use the "Enter" button on your keyboard.

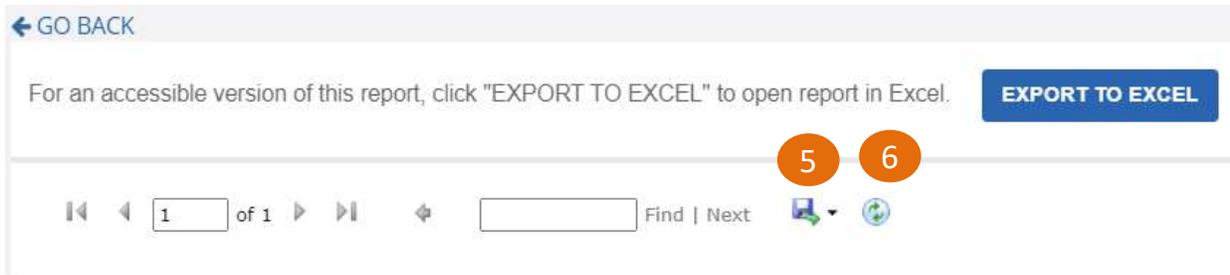
How to Navigate a Report



4. The Search functionality allows users to find data on any page of the report. The **Next** button jumps to the next instance of the search criteria within the document.

4. There's also a built-in Search functionality. Were you looking for a particular name in the report? You can type it in and use the Next button to go through the document.

How to Navigate a Report



5. The export drop down menu  allows the report to be saved in one of several format options: XML, CSV, PDF, MHTML, Excel, TIFF file, or Word.
6. The Refresh button  re-runs the report and renews the displayed data.

5. The export drop down menu allows the report to be saved in one of several format options: XML, CSV, PDF, MHTML, Excel, TIFF file, or Word. This is in addition to the big blue “Export to Excel” button in the upper right.
6. The Refresh button re-runs the report and renews the displayed data.

How to Navigate a Report: Sorting

ACTIVE CLIENTS

1
Account: Training Account 4
(S1102)
Provider ID: 999991718

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CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	ADDRESS	CITY	ST	ZIP	LATITUDE	LONGITUDE	CLIENT ALTERNATE ID
-----------	--------------------	-------------	---------	---------	------	----	-----	----------	-----------	---------------------

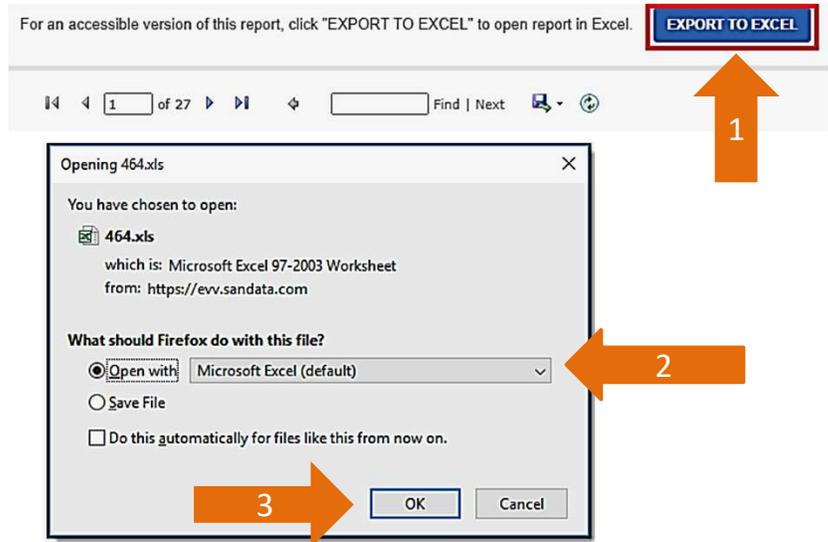
1. The **Report Grouping** tab shows general information and how the information is grouped.
2. Clicking a column's header, when the arrows are present, will sort the result in ascending/descending order based on that column's content.

Let's take a look at how the reports are sorted.

1. The Report Grouping tab shows general information and how the information is grouped.
2. Clicking a column's header, when the arrows are present, will sort the result in ascending/descending order based on that column's content. When a column is sorted, a visual indicator (arrow up/down) reveals which column and in which order it is sorted.

How to Navigate a Report: Exporting

1. Click **Export to Excel**. The **Open Report.xls** dialog box will be displayed.
2. Select **Open with Microsoft Excel** (default).
3. Click **OK**.



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If you're pleased with the results and want to export the report or share it with others:

1. Click Export to Excel. The Open Report.xls dialog box will be displayed.
2. Select Open with Microsoft Excel (default).
3. Click OK.

How to Navigate a Report: Exporting

The report opens in Microsoft Excel.

Account: Provider Training-Agency 36 (9631)

PROGRAM	SERVICE	EMPLOYEE SERVICE ID	EMPLOYEE EMAIL	EMPLOYEE NAME	VISIT DATE	# OF VISITS	HOURS	OPS	VALUE CHANGED	
DHC	T1019	5265534	booney@mailinator.com	Conley, Babara	12/25/17	00.01	Yes			
Client Totals:							1	00.01		

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The Excel report can be saved, sorted or filtered further in a way that's helpful, and shared electronically or printed.

Review of Available Reports

We will review the available Report Types and review some of the reports in each type. We have some suggested uses for you here but listen closely so you can make note of the information that would benefit your business.

All available reports, the fields they contain, and how they can be used can be found in online manual within the Sandata EVV Portal.

Daily Report Type: Active Clients

- The **Active Clients** report lists all clients in an active and pending status associated to the provider on a given date.
- Use this report to view client IDs, addresses, and phone numbers.

Report Parameters
 Account: Wisconsin UAT Training (91027)
 For: 7/10/2020 - 7/10/2020 11:59:59 PM

ACTIVE CLIENTS

Account: Wisconsin UAT Training (91027)

CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	ADDRESS	CITY	ST	ZIP	LATITUDE	LONGITUDE	CLIENT ALTERNATE
159929	7777555533	TestMbrOne, Sandata	(555)111-2233	2 E Main St	Madison	WI	53703-0000	43.07496990	-89.38409850	7777555533
159929			(301)503-9539	TestAddress	Madison	WI	53711-0000	43.01563729999999	-89.43184540	7777555533
285348		TestMbrFifteen, Sandata	(555)111-2233	2 E Main St	MADISON	WI	53703-0000	43.07496990	-89.38409850	

The Active Clients report is a great tool to use to easily identify Client ID numbers to provide to your employees. Monitor this report to identify incorrect address or land line phone numbers for clients. Updating addresses and phone numbers will help prevent visit exceptions.

Daily Report Type: Active Employees

- The **Active Employees** report displays all active employees on a given date.
- Use this report to view current employee information, such as Santrax ID and employee email used for SMC.

Report Parameters
Account: Wisconsin UAT Training (91027)
For: 7/10/2020 - 7/10/2020 11:59:59 PM

ACTIVE EMPLOYEES

Account: Wisconsin UAT Training (91027)

EMPLOYEE ID	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE SANTRAX ID	EMPLOYEE SSN	PHONE #	DEP
999955554	TestEmpEight, Sandata	WI_EMP08_Training@sandataUAT.com	999955554	***.*	(888)555-1234	-
999955557	TestEmpEleven, Sandata	WI_EMP11_Training@sandataUAT.com	999955557	***.*	(888)555-1234	-
999955561	TestEmpFifteen, Sandata	WI_EMP15_Training@sandataUAT.com	999955561	***.*	(888)555-1234	-
999955551	TestEmpFive, Sandata	WI_EMP05_Training@sandataUAT.com	999955551	***.*	(888)555-1234	-

The report displays active employees Santrax ID, employee email address (used as the app's user ID).

If you find employees on this list that are no longer with your agency, you should end date those employees in the ForwardHealth Portal. That, in turn, will update Sandata the following day -- those employees will no longer show on the active employee list.

Daily Report Type: Call Listing

- The **Call Listing** report displays all call activity for the visit on a given date.
- Use this report to understand daily visit activity.

Report Parameters
Account: Wisconsin UAT Training (91027)
For: 7/7/2020 - 7/7/2020 11:59:59 PM

Call Listing

Account: Wisconsin UAT Training (91027)
Payer: LAKELAND
Program: WIMCO

SPV	SERVICE	CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE SANTRAX ID	CALL TYPE	CALL TIME	GROUP VISIT CODE
SS125	715017	9911155799	MRBTwo, Test	TestEmpNine, Sandata	WI_EMP09_Training@sandataUAT.com	955555	MVV	10:14 AM			

 07/10/2020 12:33:10 Page 1 of 5

The call listing report is used to review call activity for the day and time selected. This report allows users to monitor trends in call activity. Remember, “Calls” on the Sandata EVV portal refers to any way that the employee starts or ends a visit, using the app, telephonic visit verification, or fixed visit verification.

Daily Report Type: Visit Verification

- The **Visit Verification** report provides information for visits on a given date.
- Use this report to monitor client verification, if required, and manual adjustments made by an administrator.

Visit Verification															
Account: Wisconsin UAT Training (91027) Payer: WIFFS Program: FFS Service: T1019						Account: Wisconsin 1 For: 7/9/2020									
CLIENT MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	EMPLOYEE SANTRAX ID	VISIT DATE	ACTUAL			ADJUSTED			BILL HOURS	CLIENT VERIFIED		
						START	END	HOURS	START	END	HOURS		SERVICE	TIME	SIGNATURE
2222333311	TestMbrEight, Sandata		TestEmpThree, Sandata	999944443	07/09/2020	07:55 AM	08:21 AM	00:26				00:26	Yes	Yes	Yes



07/10/2020 12:37:49

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The Visit Verification report provides information for visits on a given date.

- Use this report to monitor client verification (client signature at the time of the visit), if required, and manual adjustments made by an administrator. Use this report to view all information about a visit.

Reported information for each visit includes all calls, adjusted time, duration of time expressed as hours:minutes, and client verification information.

Daily Report Type: Call Summary

The **Call Summary** report pairs the start and end times and calculates the duration. (Reminder: EVV does not bill.)

ACCOUNT: MOM HOME HEALTH AND PC - CROP
(91031)
PAYER: None
PROGRAM: None

HCPCS	CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE ID	VISIT VISIT KEY	CALLS			BILL HOURS	UNITS
								START	END	HOURS		
S9123	328388	999449999	CHAOS, CREATE	Caregiver, Amber	amber.m.bey@gainweltechnologies.com	293890	2159178414	02:08 PM	02:42 PM	00:36	00:38	
S9123	328388	999449999	CHAOS, CREATE	Caregiver, Amber	amber.m.bey@gainweltechnologies.com	293890	2159178415	03:00 AM	03:15 AM	00:15	00:15	
S9123	328388	999449999	CHAOS, CREATE	Caregiver, Amber	amber.m.bey@gainweltechnologies.com	293890	2159178413	02:24 PM	03:14 PM	00:50	00:50	
S9123	328388	999449999	CHAOS, CREATE	Caregiver, Amber	amber.m.bey@gainweltechnologies.com	293890	2159178416	12:00 AM	03:15 AM	03:15	02:15	
								Total of Bill Hours: 03:56				
								Total of Completed Visits: 4				
								Total of Visits: 4				
								Grand Total of Billed Hours: 03:56				
								Grand Total of Completed Visits: 4				
								Grand Total of Visits: 4				

The Call Summary report pairs the start and end times and calculates the duration. The length of each visit, in hours:minutes, is on the right, and the tally for all visits is in the gray section below. (Reminder: EVV is not a billing system.)

FVV Report Type: FVV Assignment

- This report provides a complete view of FVV device assignment, un-assignment, and use.
- Use this report to monitor FVV use for clients or for finding a device serial number, if needed.

Fixed Visit Verification Assignment Report

Report Parameters
Account
For: 10/23/2021 - 10/23/2021 11:59:59 PM

ACCOUNT: UNIVERSAL HOME HEALTH CARE (91801)
PROVIDER ID: 43115400

SERIAL NUMBER	CLIENT NAME	CLIENT ID	MEDICAID ID	ASSIGNED DATE	UNASSIGNED DATE	FIRST USED DATE	LAST USED DATE
20014262				08/11/2021	12/30/2999		

Grand Total Assignments: 1

Sandata 10/23/2021 01:00:59 Page 1 of 1

Here is the one report about FVV devices. If your provider has FVV devices assigned to you and your clients, then the FVV report type: FVV Assignment is a good report for you to monitor for usage. This report also provides you with the serial number of the device in case you need to contact EVV Customer Care to report an error with the device.

Authorization Report Type: Clients Without Authorizations

- This report lists all clients that do not have a current authorization in the Sandata EVV Portal on a given date.
- Use this report to help identify a missing authorization in the Sandata EVV Portal.

CLIENT NAME	ID TYPE	MEDICAID / FAYER ID	AUTHORIZATION EXPIRED
	M		01/20/2020

Now we move to authorization type reports.

This report lists all clients that do not have a current authorization in the Sandata EVV Portal on a given date.

Use this report to help identify a missing authorization in the Sandata EVV Portal.

Authorization Report Type: Expiring Authorizations

- This report displays a listing of authorizations that have expired and those that will expire soon.
- This report can be used to determine whether or not a replacement authorization needs to be obtained.

Expiring Authorizations

Account: [37500]							
CLIENT							
NAME	ID TYPE	MEDICAID/ PAYER ID	PAYER	PROGRAM	SERVICE	AUTH ID	SERVICE END DATE
	M	798721983721			A	4324243543	01/20/2020
	M	317236248793				43242184842	01/21/2020
	M	482342340928			R	33234344553	01/25/2020

 01/20/2020 15:39:12 Page 1 of 2

- This report displays a listing of authorizations that have expired and those that will expire soon.
- This report can be used to determine whether or not a replacement authorization needs to be obtained.

Date Range Report Type: Employee Visit Log

- The **Employee Visit Log** summarizes all elements in an employee record of care if the employee collects that data.

Report Parameters
Account: Wisconsin UAT Training (91027)
For: 7/3/2020 - 7/17/2020 11:59:59 PM

Employee Visit Log

PAYER: INCLUSA		VISIT						LOCATION IN		LOCATION OUT		EMPLOYEE			
PRG	SRV	DATE	TIME IN	TIME OUT	HOURS	STATUS	LATITUDE, LONGITUDE	PHONE #	LATITUDE, LONGITUDE	PHONE #	NAME	MEDICAID ID	SANTRAX ID	NAME	
WMCO	S5125	7/7/2020	4:07 PM	4:36 PM	0.48	Verified				7155586104	TestEmpThree, Sandata	999944443	999944443	TestMbrFifteen, Sandata	
Task List: 0100															
WMCO	S5125	7/7/2020	4:41 PM	4:48 PM	0.12	Verified		7155586104		7155586104	TestEmpThree, Sandata	999944443	999944443	TestMbrFifteen, Sandata	
Task List: 0105															
WMCO	S5125	7/7/2020	4:19 PM	4:29 PM	0.17	Verified		7155586104		7155586104	TestEmpThree, Sandata	999944443	999944443	TestMbrFifteen, Sandata	
WMCO	S5126	7/13/2020	1:14 PM	1:22 PM	0.13	Verified	46.07034300999999 -91.18026258999998		46.07034917199386 -91.18003220803280		TestEmpThree, Sandata	999944443	999944443	TestMbrEight, Sandata	
Total Hours:					0.90										

Sandata 07/17/2020 14:34:55 Page 1 of 3

Our last grouping of reports are the date range reports.

- The Employee Visit Log summarizes all elements in an employee record of care if the employee collects that data.
- It was created for Wisconsin’s fee-for-service personal care program.
- The date range can be for any period of 31 days or less

If you choose to use EVV as the record of care for fee for service personal care (code T1019), use this Employee Visit Log report to produce a list of completed visits for a specified date range or employees to see total number of visit hours.

To use this for FFS record of care, client signature and tasks must be captured.

Note that it tallies up the hours, and that the time is listed as a decimal instead of minutes.

Date Range Report Type: Client Visit Summary

- The **Client Visit Summary** report shows all visits for the selected date range sorted by client, with each client on their own page.
- Results are sorted per visit, per service.

Report Parameters
 Account: Wisconsin UAT Training (91027)
 For: 6/26/2020 - 7/10/2020 11:59:59 PM

Client Visit Summary

Account: Wisconsin UAT Training (91027)
 Payer: LAKELAND
 SPV: None
 Client ID: 715017
 Client Medicaid ID: 9911155799
 Client Name: MRBTwo, Test

PROGRAM	SERVICE	EMPLOYEE SANTRAX ID	EMPLOYEE EMAIL	EMPLOYEE NAME	VISIT DATE	# OF VISITS	HOURS
WIMCO	S5125	944442	W_EMP02_Training@sandataUAT.com	TestEmpTwo, Sandata	06/29/20		00:35
WIMCO	S5125	944443	W_EMP03_Training@sandataUAT.com	TestEmpThree, Sandata	07/05/20		04:30
WIMCO	S5125	944443	W_EMP03_Training@sandataUAT.com	TestEmpThree, Sandata	07/08/20		04:09
Client Totals:						3	09:14

07/10/2020 12:39:11

Use the Client Visit Summary report to review visit hours and information by client. It is a useful tool to review what services were provided to a client for a given time. It also assists in understanding trends in the services clients are receiving. Results are sorted per visit, per service. Note that it adds up the time in the last column.

Date Range Report Type: Detail Visit Status

- This provides a detailed view of all visits based on the selected date range and parameters.
- Use this report to identify visits that need visit exceptions resolved.

Detail Visit Status											Report Parameters			
ACCOUNT: Wisconsin UAT Training (91027) PAYER: None PROGRAM: None SPV: None STATUS: Incomplete											Account: Wisconsin UAT Training (91027) For: 6/26/2020 - 7/10/2020 11:56:59 PM Visit Status: All			
VISIT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	SERVICE	GROUP VISIT CODE	VISIT DATE	SCHEDULED		CALL		ADJUSTED		UNRESOLVED EXCEPTIONS
								START	END	START	END	START	END	
2151122940	1111444556	TestMbrEighteen, Sandata		TestEmpNine, Sandata	S5125		06/28/2020			04:45 PM				Unauthorized Service, Visits Without Out-Calls
2151116288				TestEmpThree, Sandata	S5125		06/28/2020			11:46 AM	12:23 PM			Client Signature Exception, Unauthorized Service, Unknown Clients, Visit Verification Exception
2151150529	9990444488	TestMbrEleven, Sandata		TestEmpThree, Sandata	S5125		06/29/2020			11:02 AM	11:20 AM			Unauthorized Service
2151150175				TestEmpThree, Sandata	T1020		06/29/2020			10:52 AM				Client Signature Exception, Unauthorized Service, Unknown Clients, Visit Verification Exception, Visits Without Out-Calls

Use the Detail Visit Status report to review a detailed overview of all visits within a selected date range. It assists in easily identifying visits that need visit exceptions resolved. The report can be also printed based on exceptions or visits that need exception handling in order to get them to a verified status for claims validation.

Date Range Report Type: Summary Visit Status

This report gives a summary view of the status of all visits based on the selected date range and parameters.

Report Parameters
Account: Wisconsin UAT Training (91027)
For: 8/28/2020 - 7/10/2020 11:56:59 PM

Summary Visit Status

ACCOUNT: Wisconsin UAT Training (91027)
PAYER: CAREWIFC
PROGRAM: WINCO

STATUS	AGE					TOTAL #
	<1 DAYS	1 - 5 DAYS	6 - 10 DAYS	11 - 15 DAYS	16 - 31 DAYS	
Scheduled	0	0	0	0	0	0
In Process	0	0	0	0	0	0
Incomplete	0	1	0	2	0	3
Verified	0	0	0	1	0	1
Processed	0	0	0	0	0	0
Omit	0	0	0	0	0	0
TOTAL #	0	1	0	3	0	4

 07/10/2020 12:43:26 Page 1 of 12

Use the Summary Visit Status report to review the status of all visits within a selected date range at a high level. The report provides an easy way to quickly identify those visits requiring exception handling. This is also a helpful report for providers to get an idea of how quickly they are handling exceptions.

This report will not be accurate if your provider is not using the 'OMIT' ("do not bill) status for invalid visits.

- The results are grouped by the duration of time each visit has remained in the same status.
- It shows visits in a 31-day aging cycle.

Date Range Report Type: Visit Log

- The **Visit Log** report is a summary of all visits associated with each client within the selected date range.
- Use this report to summarize a client's call times and edit reason codes. Edit codes are defined on the report's last page.

Visit Log															
ACCOUNT: Wisconsin UAT Training (91027) PAYER: INCL USA CLIENT NAME: TestMbrFifteen, Sandata CLIENT MEDICAID ID: 1111444488															
PROGRAM	SERVICE	SPV	PRIORITY	EMPLOYEE NAME	VISIT DATE	CALL		ACTUAL HOURS	ADJUSTED		BILL		REASON CODES		
						START	END		START	END	HOURS	HOURS		RATE	
WMCO	S5125			TestEmpTwo, Sandata	Mon 06/29	☐	10:33 AM	☐	11:40 AM	00:07				☐ 01	
WMCO	S5125			TestEmpThree, Sandata	Tue 07/07	☎	04:19 PM	☎	04:29 PM	00:10			00:10		☐ 01, 04, 05
				error											
WMCO	S5125			TestEmpThree, Sandata	Tue 07/07	☎	04:41 PM	☎	04:48 PM	00:07			00:07		☐ 01, 02
WMCO	S5125			TestEmpThree, Sandata	Tue 07/07				04:38 PM	04:07 PM	04:38 PM	00:29	00:29		☐ 01, 02, 08
				invalid serv option											

The Visit Log report has all visits are listed with one client within the selected date range. Use this report to summarize a client's call times and edit reason codes. Edit codes are defined on the report's last page. This could be a helpful report to discover if certain errors happened with the same employee, and if retraining could be helpful.

Date Range Report Type: Visit Verification Activity Summary

- This report summarizes visits that have been edited.
- Only modified visits are included in this report.

Visit Verification Activity Summary											Report Parameters					
Account: Wisconsin UAT Training (91027) Payer: None Program: None											Account: Wisconsin UAT Training (91027) For: 6/29/2020 - 7/10/2020 11:59:59 PM					
CLIENT MEDICAID ID	CLIENT NAME	EMPLOYEE NAME	EMPLOYEE SANTRAX ID	SERVICE	GROUP VISIT CODE	VISIT DATE	ACTUAL START	ACTUAL END	ACTUAL HOURS	ADJUSTED START	ADJUSTED END	ADJUSTED HOURS	BILL HOURS	UNITS	CODE	REASON OMIT
Visit - Add Task to Visit - 6/29/2020 10:31 AM																
1111444550	TestMbrEighteen, Sandata	TestEmpNine, Sandata	955555	S5125		Fri 06/26	04:45 PM								08	N
Visit - Update Omit Visit Flag - 6/29/2020 11:43 AM																
1111444599	TestMbrTwenty, Sandata	TestEmpNine, Sandata	955555	S5126	350455	Mon 06/29	09:49 AM	10:11 AM	00:22					00:22	03	Y
Acknowledge exception: Client Signature Exception - 6/29/2020 11:41 AM																
9996444403	TestMbrEleven, Sandata	TestEmpThree, Sandata	944443	S5125		Mon 06/29	11:02 AM	11:20 AM	00:18					00:18	05	N
Acknowledge exception: Visit Verification Exception - 7/10/2020 12:44 PM																
1111444438	TestMbrFifteen, Sandata					Wed 07/08	06:43 AM								01	N

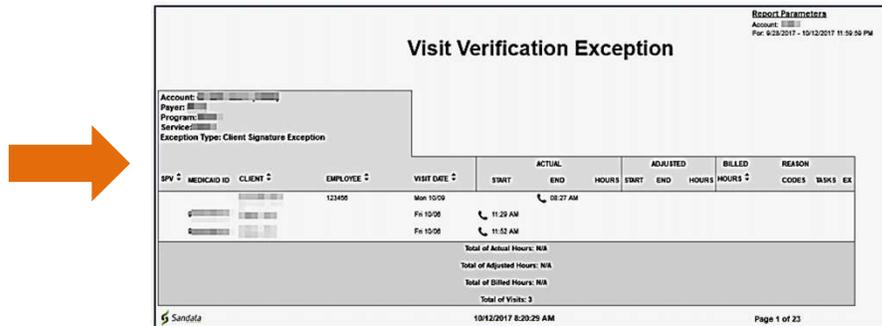
Use the Visit Verification Activity Summary report to review visits that have been edited or had modifications. The report will show what change was made, who made the change, when and why the change was made, and the reason code related to the change. Only modified visits are included in this report.

In this example the report is sorted by the user who performed the Visit Maintenance. It could also be sorted by which employee logged the visit, to understand what kind of training might be helpful to them.

This is a good report to monitor how many manual changes are having to be made to visits. DHS will be monitoring compliance in the future looking at manual entries.

Date Range Report Type: Visit Verification Exception

- The Visit Verification Exception report details the various exceptions found in Visit Maintenance within the given time.
- Use this report to view visits based on exception type.



Report Parameters
Account: [REDACTED]
For: 9/28/2017 - 10/12/2017 11:58:50 PM

Visit Verification Exception

ACCOUNT: [REDACTED]
 PAPER: [REDACTED]
 PROGRAM: [REDACTED]
 SERVICE: [REDACTED]
 Exception Type: Client Signature Exception

SPV	MEDICAID ID	CLIENT	EMPLOYEE	VISIT DATE	ACTUAL			ADJUSTED			BILLED			REASON			
					START	END	HOURS	START	END	HOURS	START	END	HOURS	CODES	WKS	EX	
			123456	Mon 10/09													
				Fri 10/06													
				Fri 10/06													
Total of Actual Hours: N/A																	
Total of Adjusted Hours: N/A																	
Total of Billed Hours: N/A																	
Total of Visits: 3																	

Sandata 10/12/2017 8:20:25 AM Page 1 of 23

Our final report:

Use the Visit Verification Exception report to review the visit verification information and activity for a date range. Use this report to view visits based on exception type. It lists currently applied exceptions (see arrow). Here, the user opted to view the Client Signature exception, but the user could choose any exception or many exceptions. It shows what exceptions need to be addressed. The report lists each exception type by page with all applicable visits.

What reports do you think you'll use?

- Authorizations?
- Exceptions?
- Verifications?
- Visit Log?
- One you created from Visit Maintenance?



What information will serve your business?

Using reports is not required, but is one way you can get summarized information when you need it. Decide which reports, if any, will serve your business.

Resources

Know that we are here to help, and providers have many resources available.

Resources

- Wisconsin EVV Customer Care
 - Phone: 833-931-2035, Monday–Friday, 7 a.m.-6 p.m.
 - Email: VDXC.ContactEVV@wisconsin.gov
- EVV webpage at www.dhs.wi.gov/evv/index.htm
 - Training resources
 - Information about EVV in Wisconsin

Our EVV Customer Care team is here to help and can be reached by calling: 833-931-2035, Monday–Friday, from 7 a.m.–6 p.m.

Or by Email support at: VDXC.ContactEVV@wisconsin.gov

And our EVV webpage at www.dhs.wisconsin.gov/evv/index.htm

for information about:

Training resources

EVV in Wisconsin

Thank You

Thank you for the important services you provide to members.



Thank you.