

Sandata Electronic Visit Verification Portal Reports

November 2023
Wisconsin EVV



P-02756 (12/2023)

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.
- The different reports support monitoring visits in the field to ensure that clients are receiving the services as expected and can help with identify employees' training needs.
- After hard launch, the Employee Visit Log can be used for fee for service T1019 record of care.

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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 with 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.

After hard launch, 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.

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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.

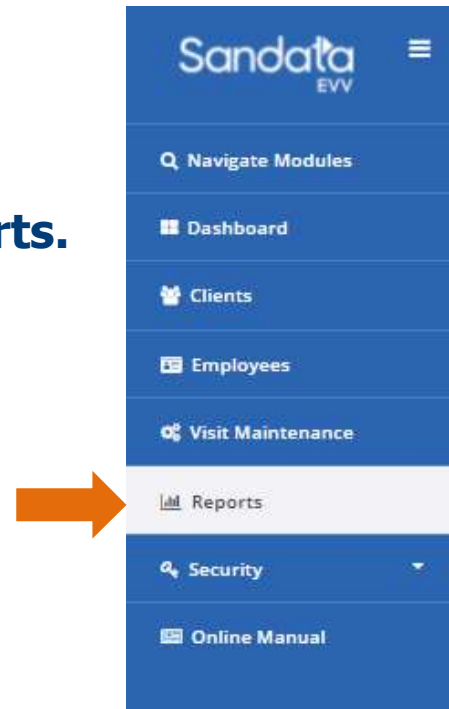
Reports referencing claims and scheduling will not provide any results. Claims and scheduling reports will not be covered in this training, since are not part of the Wisconsin DHS-provided EVV solution.

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**.



How to Run a Report

- This dynamic page is broken up into three sections:
 - Report type
 - Timeframe
 - Parameters
- The results will filter according to each of these selections.

The screenshot shows a web interface for running reports. At the top, it says 'Reports Reports' and 'Account: 91102 - winstructor'. The first section, 'Select Report', has a dropdown menu with 'Daily Reports' selected. The second section, 'Select Timeframe', includes a 'FROM DATE' field with '10/22/2021' and a 'FROM TIME' field with '12:00 AM'. The third section, 'Select Parameters', has a 'PAYER' dropdown with 'All selected (29)' and a 'CLIENT' text input field with 'Enter Client'.

This dynamic page is broken up into three sections:

- Report type
- Timeframe
- Parameters

The results will filter according to each of these selections. We will break down each of these sections over the next few slides.

How to Run a Report

The first section is the **Report Type**. Options available are Daily, Date Range, Authorization, and FVV reports.

- Click on a **Report Type**.
- Select the Report Name drop-down menu for a list of available reports.

The screenshot displays two side-by-side dropdown menus. The left menu, titled 'REPORT TYPE', has 'Daily Reports' selected, with a list of options including 'Daily Reports' and 'Date Range Reports'. The right menu, titled 'REPORT NAME', has 'Active Clients' selected, with a list of options including 'Active Clients', 'Active Employees', 'Call Listing', 'Call Summary', 'GPS Distance Exception', and 'Visit Verification'.

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The first section is the Report Type. This section drives report options. Changing the report type from Daily Reports to Date Range report type will display a different grouping of report names to choose from.

“Daily” displays results for a selected single date. “Date Range” displays results for a selected date range. The maximum range is 730 days (2 years).

The dates, either as a single day or a range of dates, can go back to the start of the provider’s EVV record-keeping.

On our screenshot, we see a daily report selection and its list of available reports

- Click on a Report Type.
- Select the Report Name drop-down menu for a list of available reports.

How to Run a Report

Select **Timeframe**

- Daily report type will default to today's date but can be reset.
- Date range will default to date two weeks prior from today but can be reset for timeframes back to the beginning of the provider's EVV use.

The screenshot shows a 'Select Timeframe' form with four input fields arranged in a 2x2 grid. The top row is for dates, labeled 'FROM DATE MM/DD/YYYY' and 'TO DATE MM/DD/YYYY'. Both date fields contain '07/10/2020' and have a calendar icon to their right. The bottom row is for times, labeled 'FROM TIME HH:MM AM/PM' and 'TO TIME HH:MM AM/PM'. The 'FROM TIME' field contains '12:00 AM' and the 'TO TIME' field contains '11:59 PM', both with a clock icon to their right.

Select Timeframe	
FROM DATE MM/DD/YYYY	TO DATE MM/DD/YYYY
07/10/2020	07/10/2020
FROM TIME HH:MM AM/PM	TO TIME HH:MM AM/PM
12:00 AM	11:59 PM

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Select the timeframe:

- Daily report type will default to today's date, but can be reset to any date in the provider's EVV record keeping.
- Date range will default to date two weeks prior from today, but can be re-set for timeframes back to the start of the provider's EVV record-keeping. The exact timespan range available, whether two weeks, one month, or longer, varies by report.

How to Run a Report

- Refine the results by using **Select Parameters** to filter the data. Parameters are optional and vary based on selection.
- Click **Run Report**.



The screenshot shows a web form titled "Select Parameters". It contains several input fields for filtering data:

- PAYER**: A dropdown menu with "All selected (29)" selected.
- PROGRAM**: A dropdown menu with "All selected (4)" selected.
- CLIENT**: A text input field with the placeholder "Enter Client".
- CLIENT MEDICAID ID**: A text input field with the placeholder "Enter Client Medicaid ID".
- SUPERVISOR**: A dropdown menu with "All" selected.

At the bottom right of the form, there are two buttons: a white "CLEAR" button and a blue "RUN REPORT" button.

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

You can always download the results to Excel and filter further.

Using parameters 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 parameters.

Parameters are the last fields to choose from. That means report will filter by type and timeframe, and then these extra parameters.

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)222-5676	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)222-5676	123 Main Street	MILWAUKEE	WI	53212-0000	43.07327150	-87.90896230	
414764			(555)222-5676	123 Main Street	MILWAUKEE	WI	53212-0000	43.07327150	-87.90896230	

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The information will display as a preview report screen.

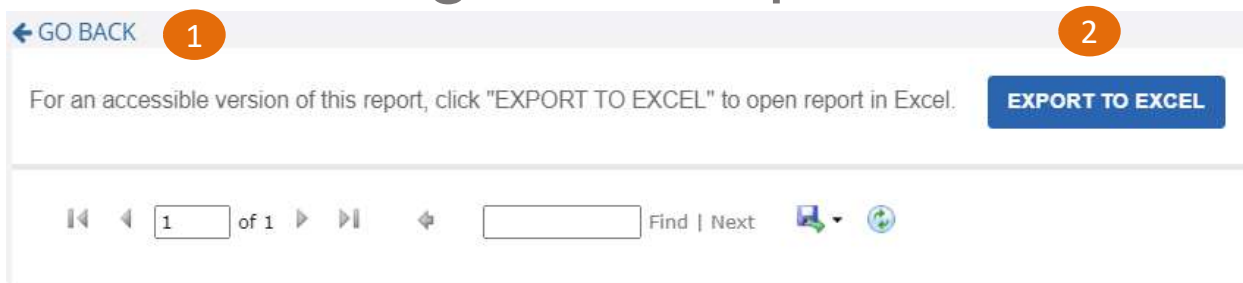
The report parameters in top right corner of the report will show on every report. It's a great tool to use if you feel data didn't pull to your report that you thought should. You can check the parameters you chose without having to exit the report to check

(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.

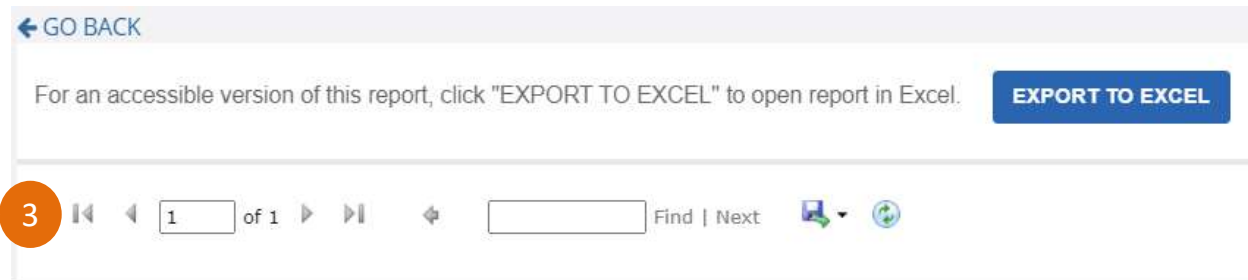
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On the preview screen, there are some tools:

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.

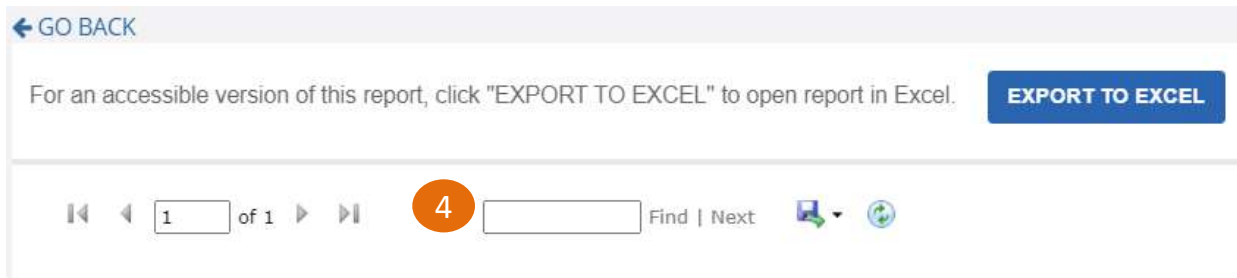
How to Navigate a Report



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.

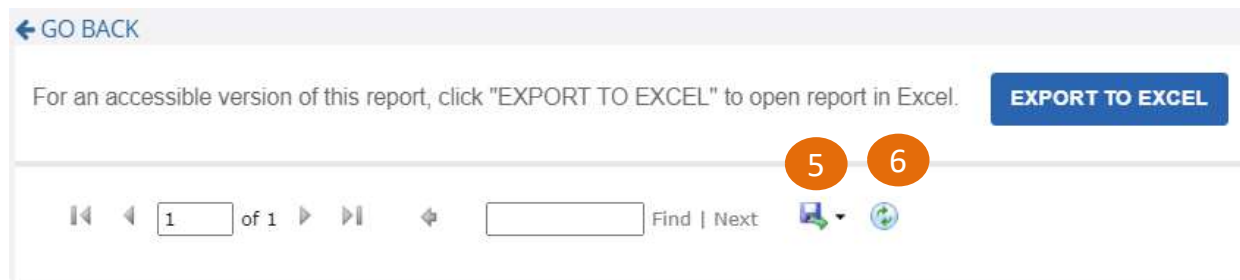
How to Navigate a Report





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 (91102) Provider ID: 999991718										
2										
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.

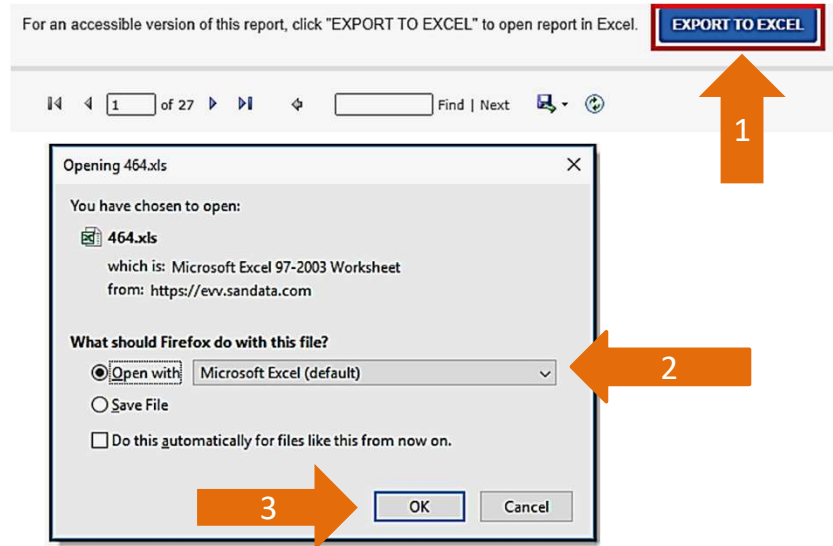
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Let's take a look at how the reports are sorted.

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	EMPLOYEE EMAIL	EMPLOYEE NAME	VISIT DATE	# OF VISITS	HOURS GPS	VALUE
CHC	T1019	9950204	booney@mainsator.com	Conley, Barbara	5/25/17	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.

ACTIVE CLIENTS										Report Parameters
Account: Wisconsin UAT Training (91027)										Account: Wisconsin UAT Training (91027) For: 7/10/2020 - 7/10/2020 11:59:59 PM
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	43.07496860	-89.38409880	7777555533
159929			(301)503-9539	TestAddress	Madison	WI	53711-0000	43.015837299999999	-89.43184540	7777555533
286348		TestMbrFifteen, Sandata	(555)111-2233	2 E Main St	MADISON	WI	53703-0000	43.07496860	-89.38409880	

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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.

ACTIVE EMPLOYEES						
<div>Report Parameters</div> <div>Account: Wisconsin UAT Training (91027) For: 7/10/2020 - 7/10/2020 11:59:59 PM</div>						
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	-

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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.

Call Listing											
Account: Wisconsin UAT Training (91027) Payer: LAKELAND Program: WIMCO						Report Parameters Account: Wisconsin UAT Training (91027) For: 7/7/2020 - 7/7/2020 11:59:59 PM					
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	MRSTwo, Test	TestEmpNine, Sandata	WI_EMP09_Training@sandataUAT.com	955555	MVV	10:14 AM			
Sandata 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 UAT Training (91027)
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 12:37:49Page 1 of 2

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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. Use this report to view all information about a visit.

Reported information for each visit includes all calls, adjusted 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 is not a billing system.)

Call Summary

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

ACCOUNT: Wisconsin UAT Training (91027)
PAYER: None
PROGRAM: None

SERVICE	CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE SANTRAX ID	START	END	HOURS
			TestEmpEight, Sandata	WM_EMP08_Training@sandataUAT.com		955554		12:11 PM	
Total of Bill Hours: N/A									
Total of Completed Visits: 0									
Total of Visits: 1									

07/10/2020 12:35:49

The Call Summary report pairs the start and end times and calculates the duration. (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							
ACCOUNT: UNIVERSAL HOME HEALTH CARE (91801) PROVIDER ID: 43113400				Report Parameters Account For: 10/23/2021 - 10/23/2021 11:59:59 PM			
SERIAL NUMBER	CLIENT NAME	CLIENT ID	MEDICAID ID	ASSIGNED DATE	UNASSIGNED DATE	FIRST USED DATE	LAST USED DATE
20014202				08/11/2021	12/30/2999		
Grand Total Assignments: 1							
Sandata		10/23/2021 01:00:59			Page 1 of 1		

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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.

Clients Without Authorizations			
Account:			
CLIENT NAME ↕	ID TYPE	MEDICAID / PAYER ID ↕	AUTHORIZATION EXPIRED ↕
	M		01/20/2020

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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	317236248763				43242194842	01/21/2020
	M	482342340928			R	23234344553	01/25/2020

Sandata

01/20/2020 15:39:12

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- 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.
- It was created for Wisconsin's fee-for-service program.
- The date range can be for any period of 31 days or less.

Report Parameters
Amount: Wisconsin S&T Training (81027)
For: 7/5/2020 - 7/17/2020 11:58:34 PM

Employee Visit Log											
PRYER: INCLUSA											
		VISIT				LOCATION IN		LOCATION OUT		EMPLOYEE	
PRG :	SRV :	DATE :	TIME IN	TIME OUT	HOURS	STATUS	LATITUDE, LONGITUDE	PHONE #	LATITUDE, LONGITUDE	PHONE #	NAME :
WMCO	SS125	7/7/2020	4:57 PM	4:36 PM	0.48	Verified			7155558104		TestEmpThresh, Sandata
Task Line: 0100											
WMCO	SS125	7/7/2020	4:41 PM	4:45 PM	0.12	Verified	7155558104		7155558104		TestEmpThresh, Sandata
Task Line: 0105											
WMCO	SS125	7/7/2020	4:19 PM	4:29 PM	0.17	Verified	7155558104		7155558104		TestEmpThresh, Sandata
WMCO	SS126	7/13/2020	1:14 PM	1:22 PM	0.13	Verified	48.07034009999999, -91.18003220003200	48.07034817199368, -91.18003220003200			TestEmpThresh, Sandata
Total Hours: 0.90											

Sandata

07/17/2020 14:34:55

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Our last grouping of reports are the date range reports.

If you choose to use EVV as the record of care for fee for service T1019 care, 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.

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 - 7/16/2020 11:56:59 PM

Client Visit Summary

Account: Wisconsin UAT Training (91027)
Payer: LAKELAND
SPN: None
Client ID: 715017
Client Medicaid ID: 991155799
Client Name: MISSTwo, Test

PROGRAM	SERVICE	EMPLOYEE SANDATA ID	EMPLOYEE EMAIL	EMPLOYEE NAME	VISIT DATE	# OF VISITS	HOURS	
WMCO	S5125	644442	WL_EMP02_Training@sandataUAT.com	TestEmpTwo, Sandata	06/26/20		00:35	<input type="checkbox"/>
WMCO	S5125	644443	WL_EMP03_Training@sandataUAT.com	TestEmpThree, Sandata	07/08/20		04:30	<input type="checkbox"/>
WMCO	S5125	644443	WL_EMP03_Training@sandataUAT.com	TestEmpThree, Sandata	07/08/20		04:09	<input type="checkbox"/>
Client Totals:						3	09:14	

Sandata

07/19/2020 12:39:11

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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.

- 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.


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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.

Summary Visit Status						
<div>ACCOUNT: Wisconsin UAT Training (91027) PAYER: CAREWIFC PROGRAM: WIMCO</div> <div>Report Parameters Account: Wisconsin UAT Training (91027) For: 6/25/2020 - 7/10/2020 11:56:59 PM</div>						
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: INCLUSA CLIENT NAME: TestMbrFifteen, Sandata CLIENT MEDICAID ID: 1111444488													
PROGRAM	SERVICE	SPV	PRIORITY	EMPLOYEE NAME	VISIT DATE	CALL		ACTUAL	ADJUSTED		BILL		REASON CODES
						START	END	HOURS	START	END	HOURS	RATE	
WMCO	S5125			TestEmpTwo, Sandata	Mon 06/29	10:53 AM	11:40 AM	00:47					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													
<div> <div>Report Parameters</div> <div>Account: Wisconsin UAT Training (91027)</div> <div>For: 6/28/2020 - 7/10/2020 11:59:59 PM</div> </div>													
<div> <div>Account: Wisconsin UAT Training (91027)</div> <div>Payer: None</div> <div>Program: None</div> </div>													
CLIENT MEDICAID ID	CLIENT NAME	EMPLOYEE NAME	EMPLOYEE SANTRAX ID	SERVICE	GROUP VISIT CODE	VISIT DATE	START	END	HOURS	ADJUSTED START	ADJUSTED END	BILL HOURS	REASON CODE
Visit - Add Task to Visit - 6/29/2020 10:31 AM													
1111444550	TestMrEighteen, Sandra	TestEmpNine, Sandra	95555	S5125		Fri 06/26	04:45 PM						08 N
Visit - Update Omit Visit Flag - 6/29/2020 11:43 AM													
1111444599	TestMrTwenty, Sandra	TestEmpNine, Sandra	95555	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													
9999444403	TestMrEleven, Sandra	TestEmpThree, Sandra	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													
1111444458	TestMrFifteen, Sandra				710179	Wed 07/08	08:43 AM						01 N

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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.

Visit Verification Exception

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

ACCOUNT: [blank]
Paper: [blank]
Program: [blank]
Service: [blank]
Exception Type: Client Signature Exception

SPV	MEDICAID ID	CLIENT	EMPLOYEE	VISIT DATE	ACTUAL START	END	HOURS	ADJUSTED START	END	HOURS	BILLED HOURS	REASON CODES	WKS	EX
			123456	Mon 10/09	11:28 AM	08:27 AM								
				Fri 10/06	11:52 AM									
				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

Sanata 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.

Resources

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

Resources

- 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.wisconsin.gov/evv/index.htm
 - Training resources
 - Information about EVV in Wisconsin

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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.



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of HEALTH SERVICES