Training Workers for Electronic Visit Verification

Investing time to train workers will provide a solid foundation for Electronic Visit Verification (EVV). The employer should decide which type of training and which resources will be most effective for their situation. These steps are specific to Sandata training.

Step One

Introduce EVV using either the short informational video or EVV flyer.

Step Two

Decide on a training structure:

In Person Training Options	Remote or Independent Training Options
One-on-one coaching, in person	One-on-one coaching, online or by phone
Small group training, in person	Small group training, online
Larger group training, in person	Larger group training, online
Assigned reading with question session, in person	Emailed or mailed packet or a thumb drive of materials for independent study
Mailed or emailed packet with follow-up one-on-one coaching in person	Follow-up one-on-one coaching after mailed or emailed packet, online or by phone
Mailed or emailed packet with follow-up group coaching in person	Follow-up small or large group training after mailed or emailed packet, online

Step Three

Find out which check in/out methods will be used. The Training Workers webpage has resources to view, print, download, or link. Most workers will **not** need to review all the resources.

- For tips on developing training content, refer to Successful Training.
- Translations in Spanish and Hmong are available for all written resources. Translations in other languages can be requested by emailing vdxc.contactevv@wisconsin.gov. Please allow extra time for these written translations.
- Select the types of materials you will use from the Training Workers webpage:

What method to check in/out will be used by the worker?	Written materials available?	PowerPoint presentations available?	Videos available?
Sandata Mobile Connect (SMC) app	Yes	Yes	Yes
Telephonic Visit Verification (TVV)	Yes	Yes	Yes
Fixed Visit Verification (FVV)	Yes	Yes	Yes

Step Four

Provide the Worker Visit Card Template and fill in the information the worker will need.

Step Five

Consider hands-on practice where possible. Have the worker use the method they will most often access (SMC, TVV, or FVV) with guidance.

To remove these practice visits from view in the Sandata EVV Portal, the portal administrator should mark "Do Not Bill" so the practice visit is omitted from normal portal views:

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
BASKIN, MARY	Crandell, Mellisa	Supportive Home Care/15min	08/09/2020	08:58 AM	●		08:58 AM			Incomplete	☐	☐	✎

Step Six

Be patient. Three weeks or more may be needed for new habits to develop. Follow up to answer any questions. Offer retraining and encouragement. Consider pairing a confident worker with one who needs coaching.

Here are some date range reports from the Sandata EVV Portal that summarize workers' efforts in capturing visits:

- Visit Verification Activity Summary: Lists only visits that have been edited.
- Visit Log: Lists all visits for each client, along with edit reason codes that are defined on the report's last page.
- Detail Visit Status: Lists all visits and any unresolved exceptions.

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