Electronic Visit Verification Guide

The Employee's guide on how to use the Electronic Visit Verification system (EVV)

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The Roles in EVV

- **Employee =** The person **providing** care
- **Client** = The person **receiving** care
- **Designee** = A Client's **representative**
- **Fiscal Intermediary** = ARIS Solutions

The Employee

- The person who comes to the client's home to provided authorized services for the client, known as "**Visits**".
- The Employee **MUST** check in and check out for each visit using either the **Sandata Mobile Connect App** (SMC) or by using the client's landline **Telephone** to place a toll-free telephone call.
- Depending on the state requirements, the Employee may have to add **Tasks** (services) performed during each visit.
- ***NOTE:*** *"TASKS" may or may not be applicable for your program.*

The Client:

- The client is responsible for making sure each home visit is "**Verified**".
- The client will have access to the EVV website to view and manage details about the services they received.

The Designee

- The Designee is a person chosen by the client to handle the client's responsibilities when they are not able to do so for themselves.

- The Designee will have the same access and permissions to the EVV website as the client.

The Fiscal

- The Fiscal Intermediary is a service that performs financial functions on behalf of the client including processing payroll documentation and processing payroll on behalf of employer.

- The information for both the client and the employee in the EVV website is provided by the fiscal and therefore can only be changed by the fiscal.

- In some states the **Visit Maintenance** section will be handled by the fiscal, otherwise, the client will have access to it.

The EVV Website

You will need a computer with an internet connection to access the EVV website.

Please use one of the following supported browsers,

- Microsoft Edge
- Mozilla Firefox
- Google Chrome

NOTE: If accessing the EVV website on a tablet, be aware that the screens may not line up correctly, therefore, we recommend you use either a desktop or laptop computer.

Accessing the Website

- Double-click on your browse icon
- Type the EVV website into the URL field at the top of the page **evv.sandata.com**

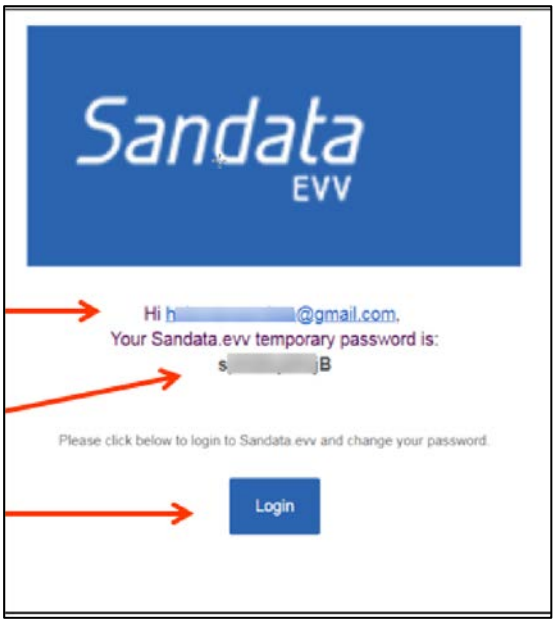
- Press the **ENTER** key
- The website login page will display

How to Log in For the First Time

After completing your training, you will receive an email that will display your…

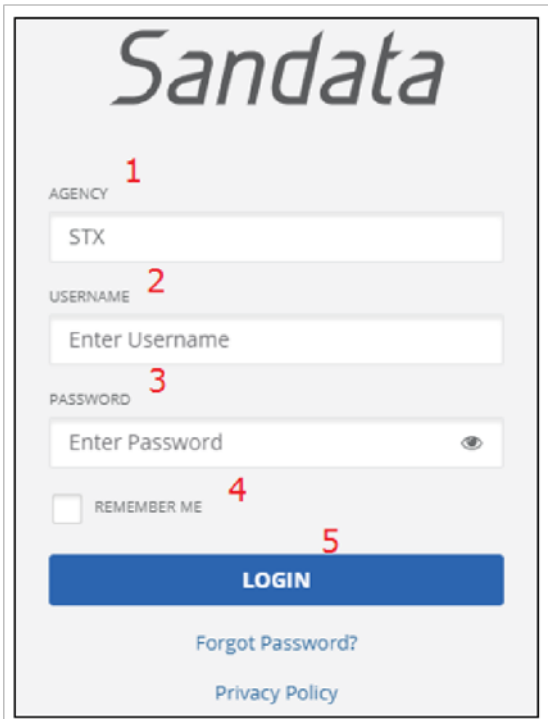
- **email address**
  (which will be your Username)

- A **Temporary Password**
- Click the **Login** button



These are the fields you will see on the login page.

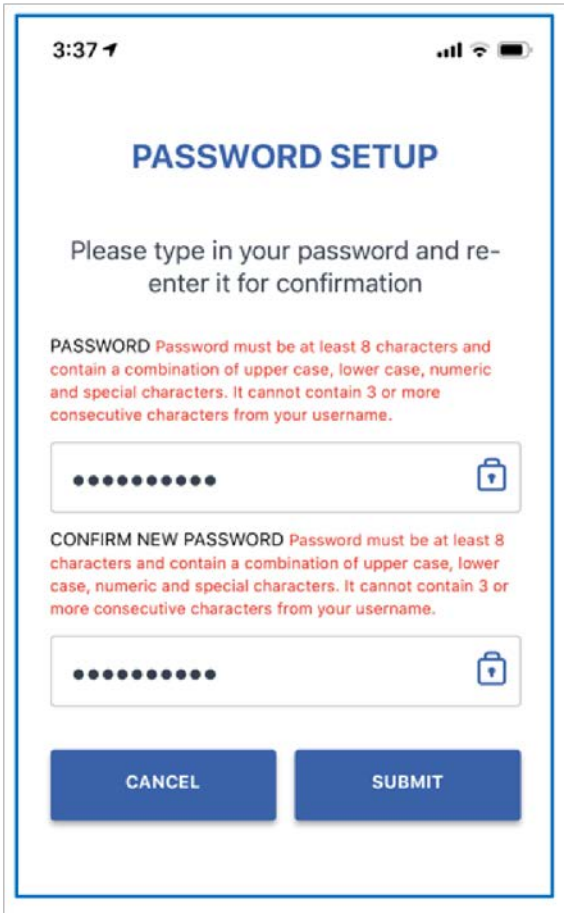
1. AGENCY
2. USERNAME
3. PASSWORD
4. REMEMBER ME
5. LOGIN



You will be asked to setup a new password.

Your password <u>MUST</u> have at least:

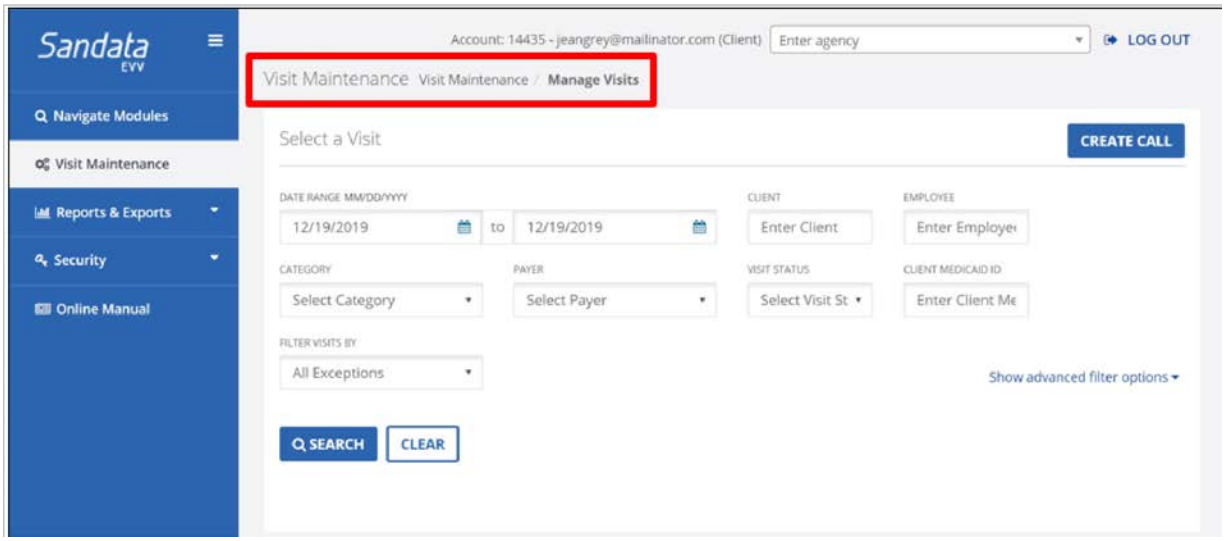
- 1 Uppercase letter
- 1 Lowercase letter
- 1 Number
- 1 Special character (! @#$^&*)
- Be at least 12 characters long



Enter the new password twice and the tap **Submit**

Visit Maintenance

After you log in, the Visit Maintenance page will display. The Visit Maintenance screen is where you can view visits by date and also exceptions for each visit. Your client must approve the hours that you worked and the services that you performed before you are paid.



What are Exceptions

Exceptions occur when information is missing from a visit or could not be verified by the EVV system.

<u>Example:</u>

An employee might *forget* to **Start** a visit, **End** a visit, **Task**(s) might be missing, or the client's location could not be verified.

These are called **Exceptions** and the process to correct these exceptions are in the **Visit Maintenance** screen.

There are Two Types of Exceptions

1. Exceptions that *must* be <u>Fixed</u>
    a. An exception that can only be fixed, must be done by a client or the fiscal.
2. Exceptions that *must* be <u>Acknowledged</u>
    a. An exception that can only be acknowledged has a check box next to the exception on the right side of the screen. The check box is checked to indicate that the exception has be viewed and acknowledged to have the visit move to a verify state.

Exceptions are displayed when there is something wrong with a visit and cannot be verified.

- All Exceptions must be either fixed or acknowledged by the employer in the Visit Maintenance screen in order for the status to change to **verified.**

Most Common Types of Exceptions

- **Client Signature** – The client's electronic signature or voice recording is missing.

- **Service Verification** – The client did not verify the service at the end of the visit.

- **Missing Service** – Services provided during the visit are missing.

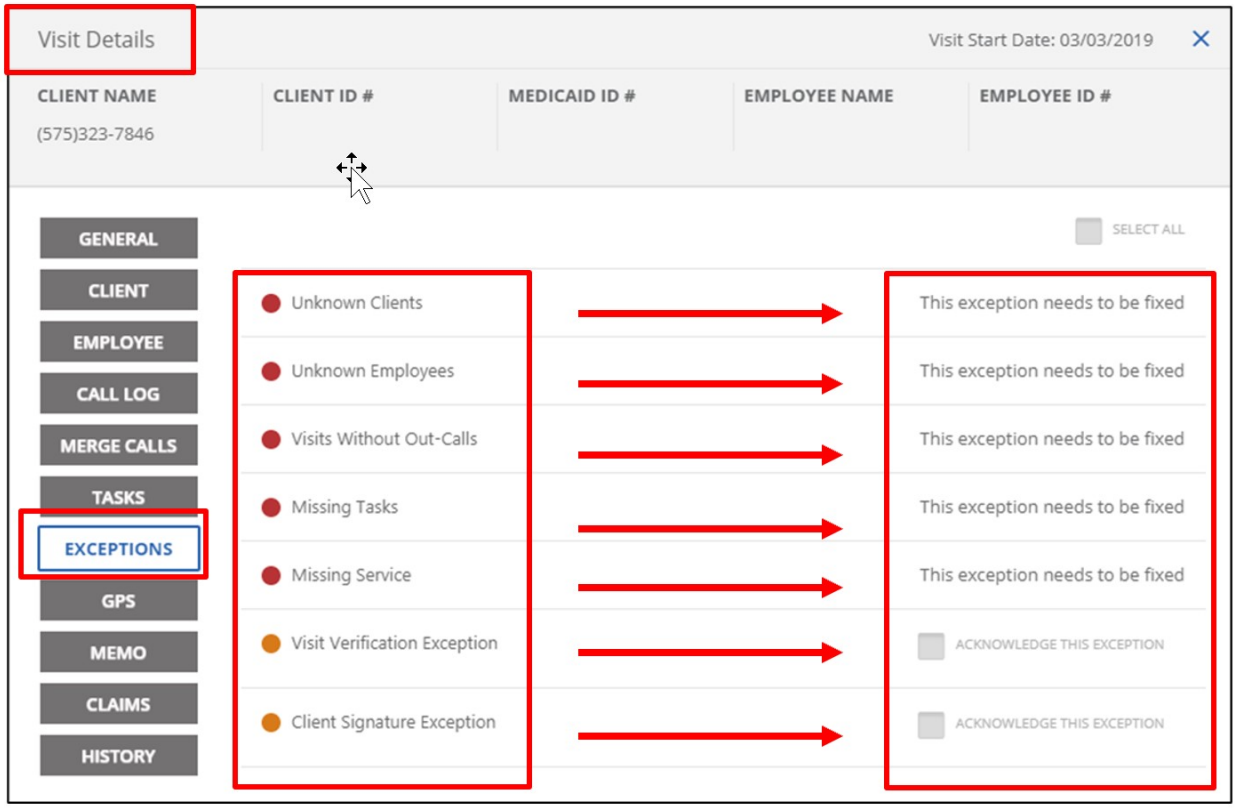
- **Missing Task** – The minimum number of tasks is missing.

- **Visit Verification** – The client has not verified the visit time at the end of a visit.

- **Visit without in-calls/out-calls** – The visit does not have a call-in and/or a call-out.

Exceptions Screen

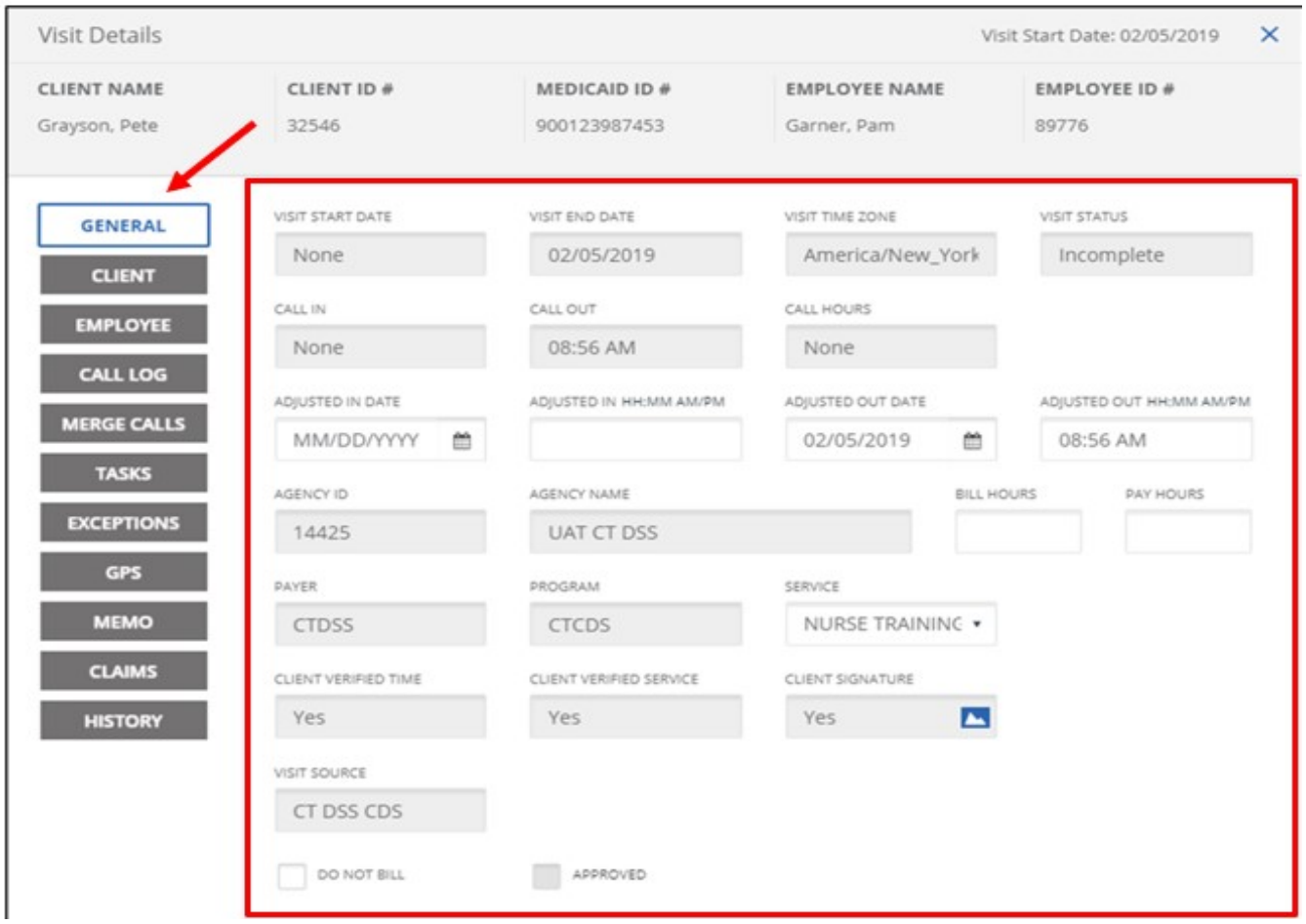
The **Visit Detail** screen will list the exceptions for the visit and the options to resolve each exception. Double click on any visit to bring up the **Visit Detail** screen, then click the **Exceptions** tab.



You can **ONLY VIEW** exceptions. You will not be able to fix or acknowledge them. Only the client can fix or acknowledge exceptions.

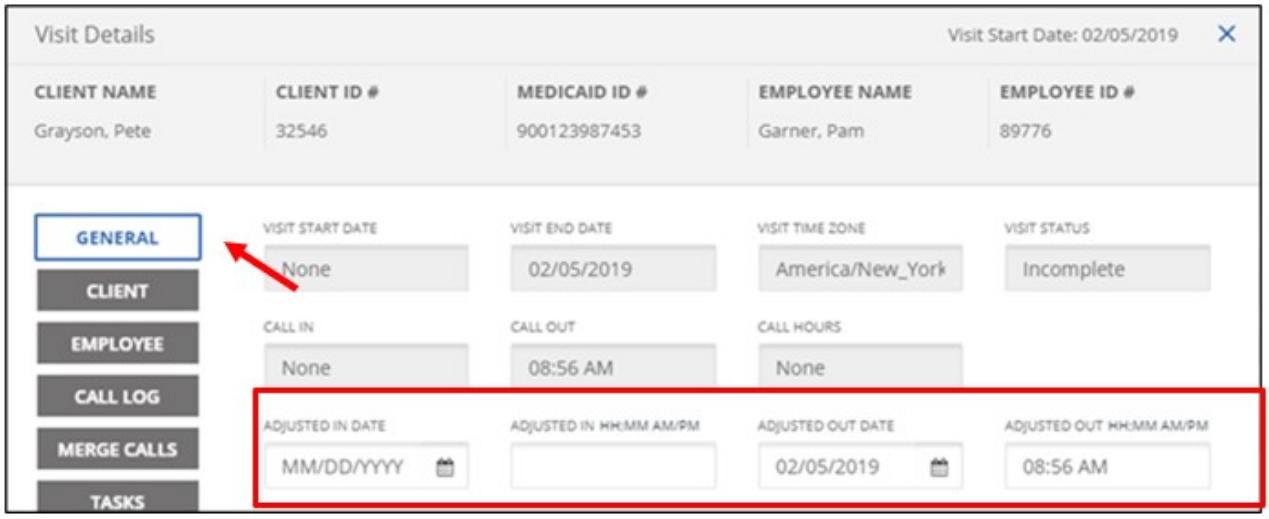
The General Tab

Displays the start and end time, status, service, among other details for the selected visit.



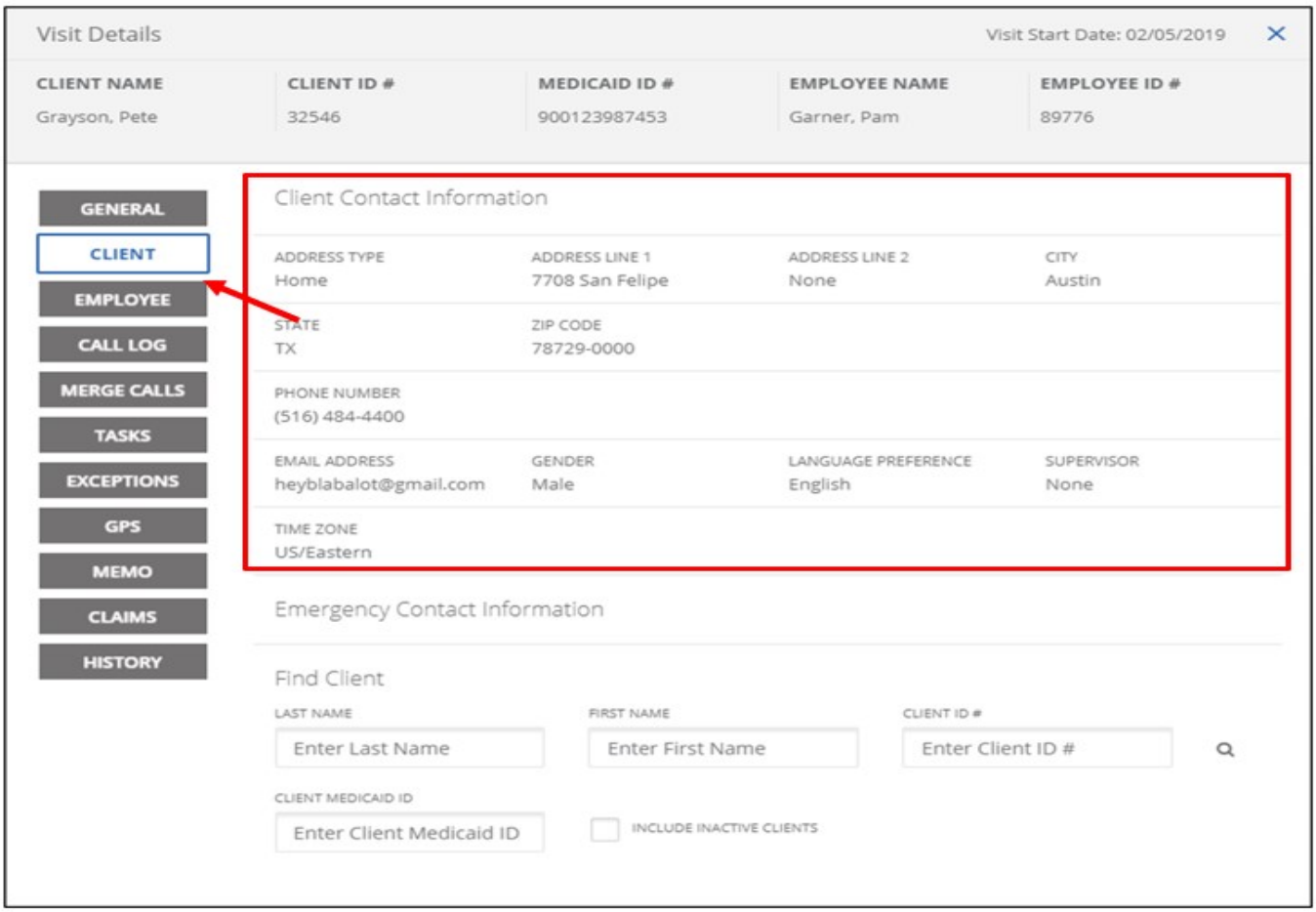
Updating Visit Information

If you need to update the Adjusted-In Date, Adjusted-In Time, Adjusted Out Date, and Adjusted Out Time.



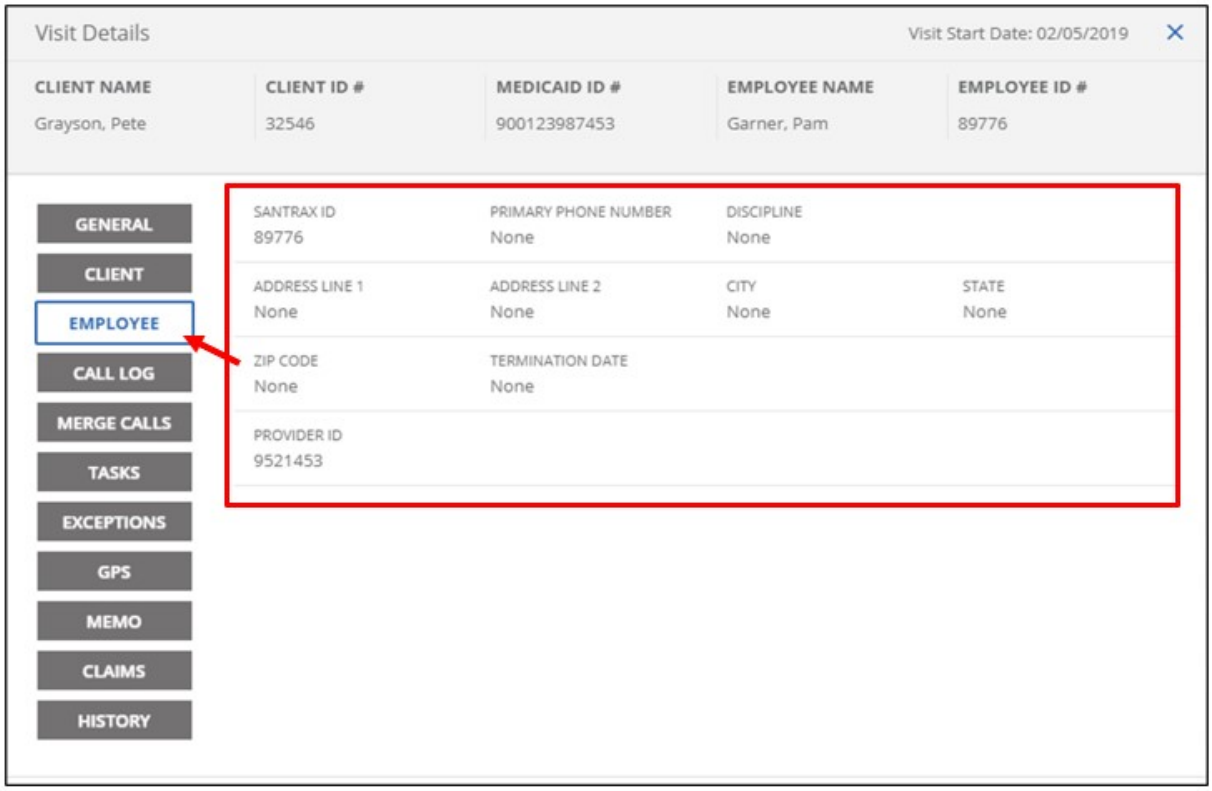
The Client Tab

Displays details about your client's **ADDRESS, PHONE NUMBER,** and **LANGUAGE PREFERENCE.**



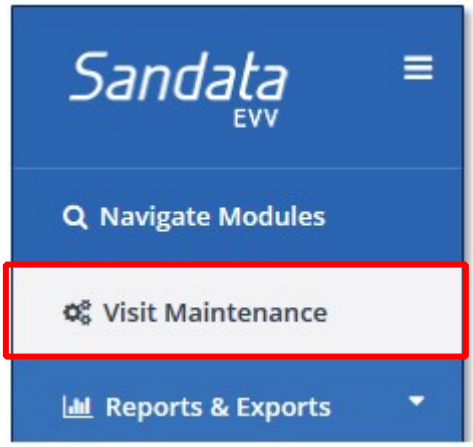
The Employee Tab

Displays details about you such as: **EMPLOYEE EMAIL, SANTRAX ID, ADDRESS,** and **PHONE NUMBER.**

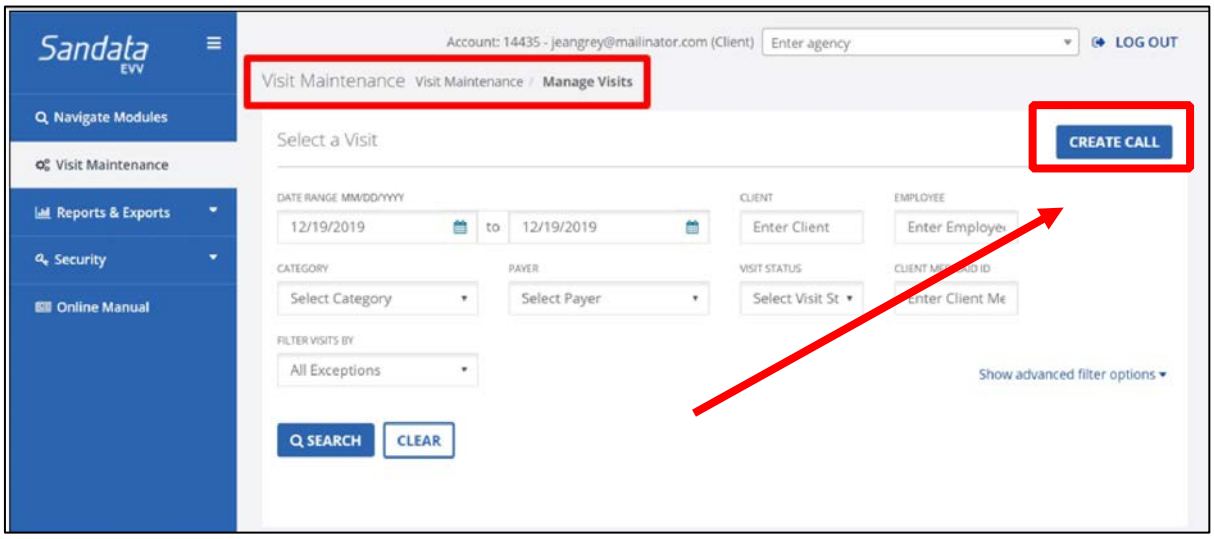


How to Add a Visit (CREATE CALL)

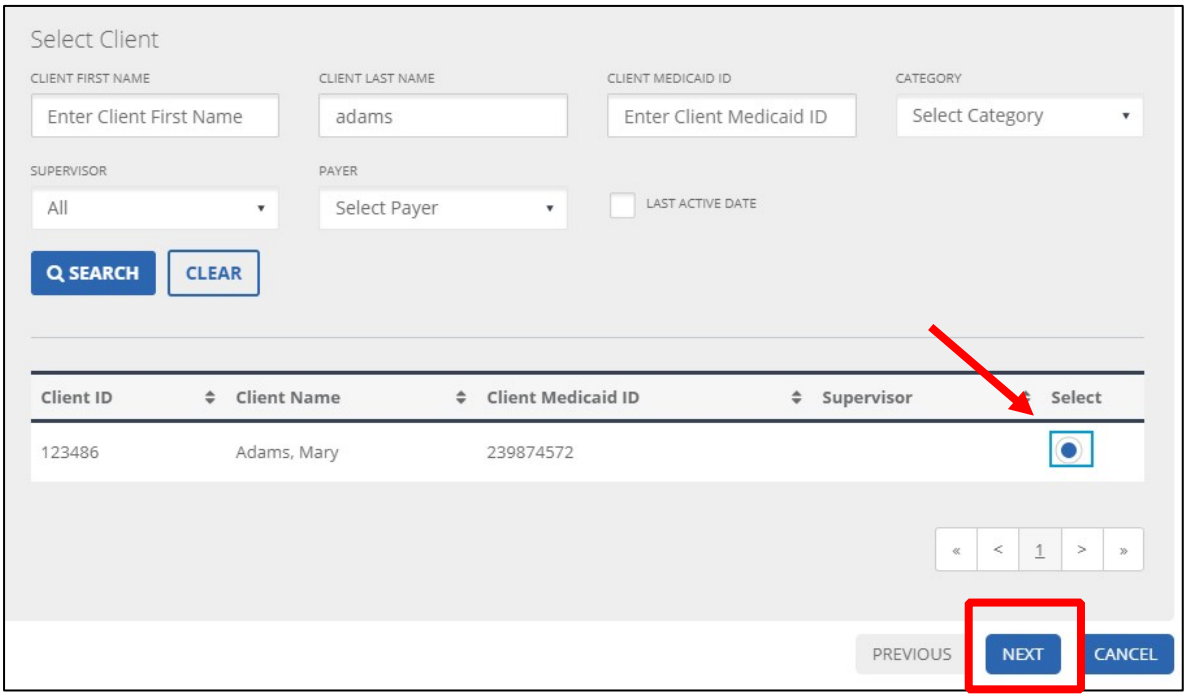
From the EVV website menu, click **Visit Maintenance**.



Click **CREATE CALL** on the right.

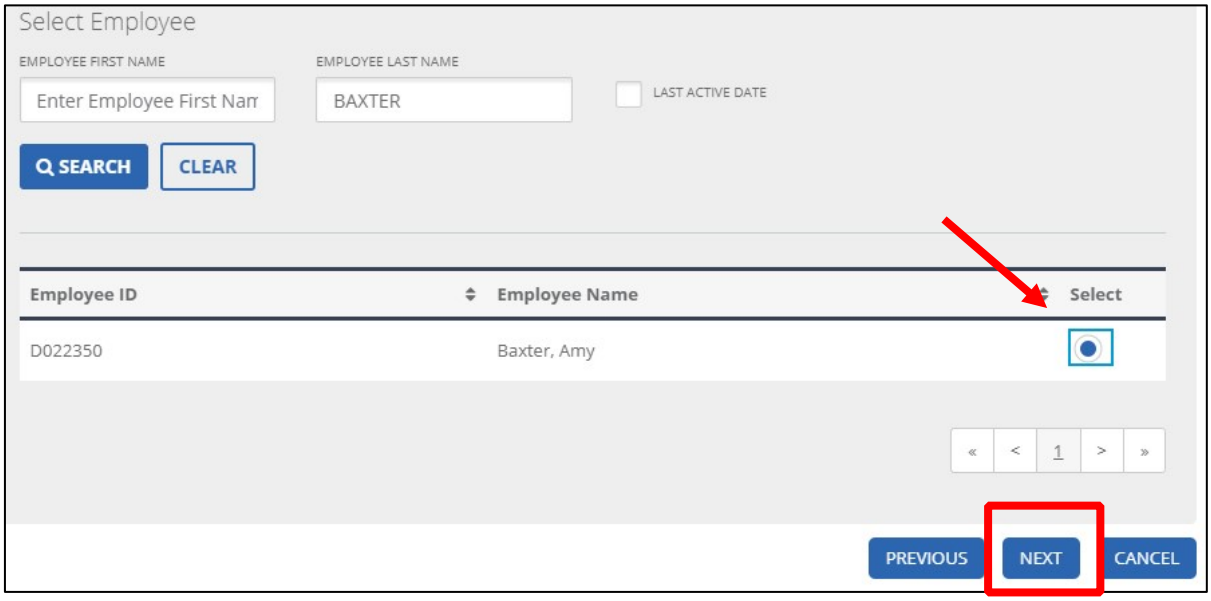


- Enter the client's first and last name, click **SEARCH** to list your client.
- Select the client in the list by clicking on the **Select** circle on the right side of the page.
- Click **NEXT.**

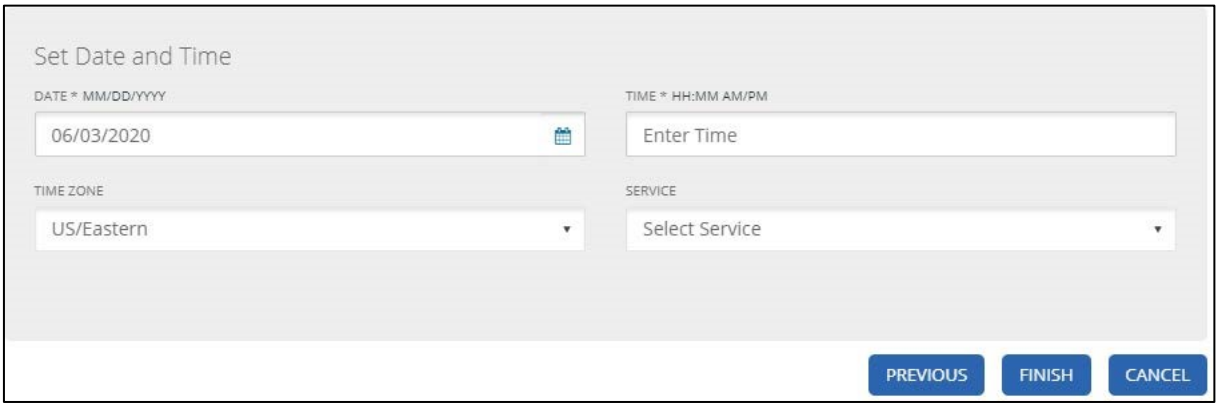


- Enter your last name, click **SEARCH.**
- Select your name from the list by clicking on the **Select** circle on the right side of the page.

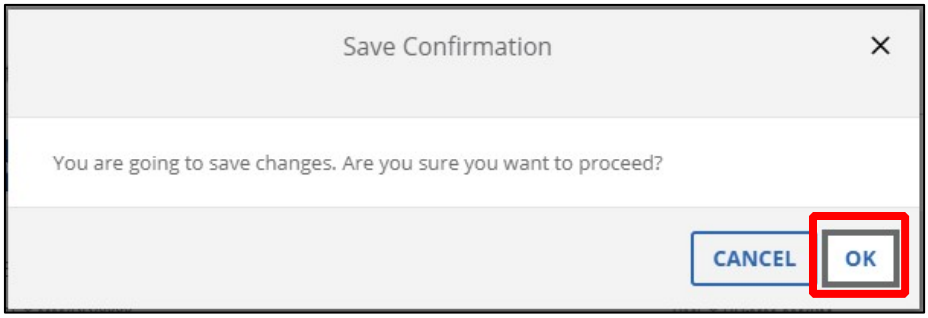
- Click **NEXT.**



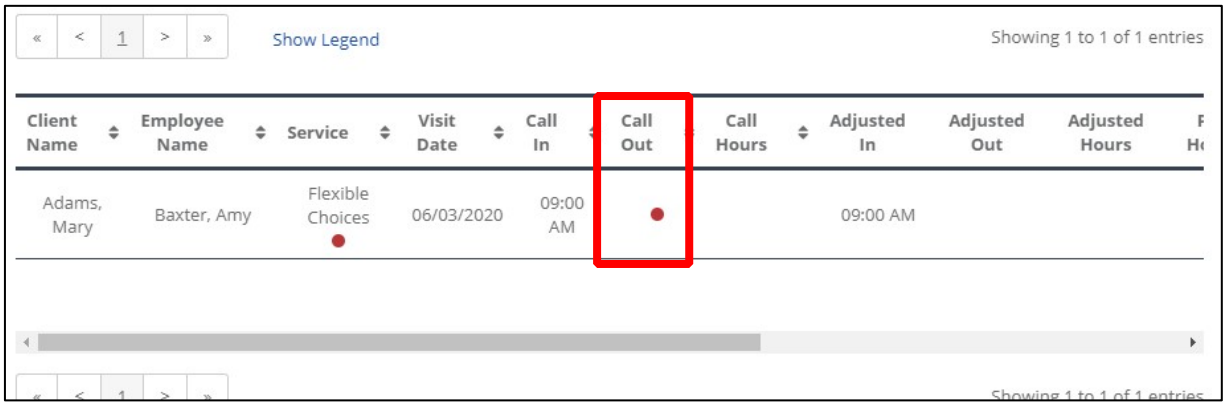
- Select the **DATE**, **TIME** and **SERVICES.**
- Click **FINISH.**



- The **Save Confirmation** dialog box displays.
- Click **OK**.



Your **ADDED** visit will now appear; however, it will ONLY show the call-in time you entered. This will display as an exception and will need to be fixed in order for this visit to be verified.

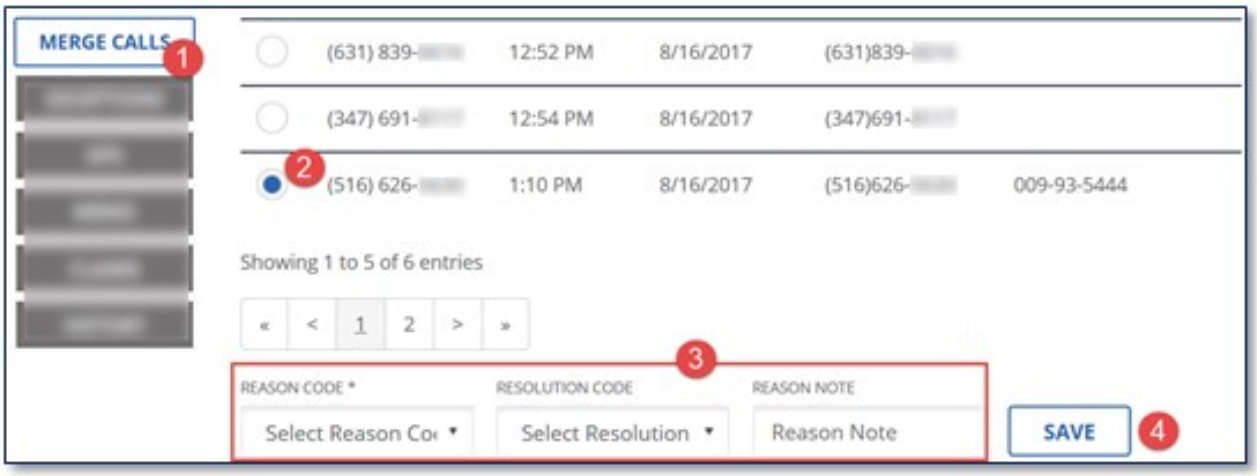


Merging Calls

Displays a list of calls that may be merged with a visit if the visit is missing a call time. Calls can be merged if start/end times are close and they are not associated with another visit.

1. Click the **MERGE CALLS** link to see if there are any available calls that can be merged to the visit.
2. Click the radio button next to the line to select the call, if there is a call to merge.
3. Select the **REASON CODE**, **RESOLUTION CODE** and **REASON NOTE**, if needed.

4. Click **SAVE.**



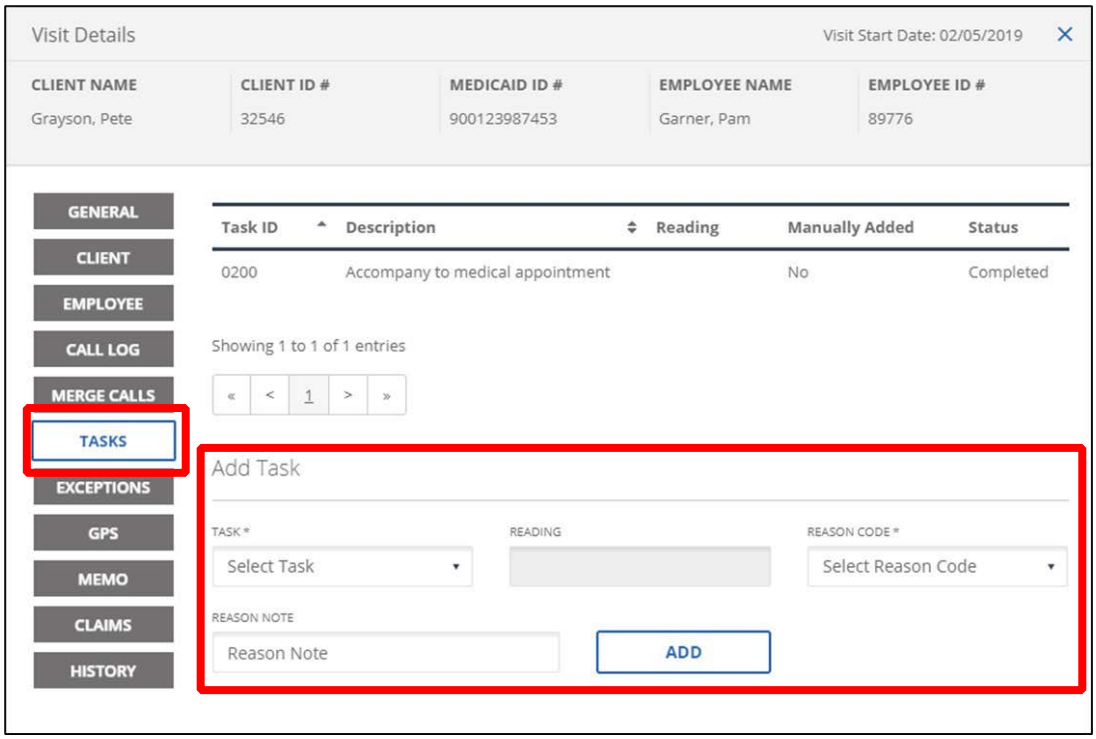
It is recommended to go to the ***Merge Calls*** screen first to see if there are any available calls that can be merged. If there are none, you can go back to the *Call Log* to manually add a call time.

TASKS

Tasks are services performed by the employee during the visit. They are entered into the system by the employee after the visit. A person with the appropriate permissions can add additional tasks to the visit or delete existing tasks.

Adding a TASK

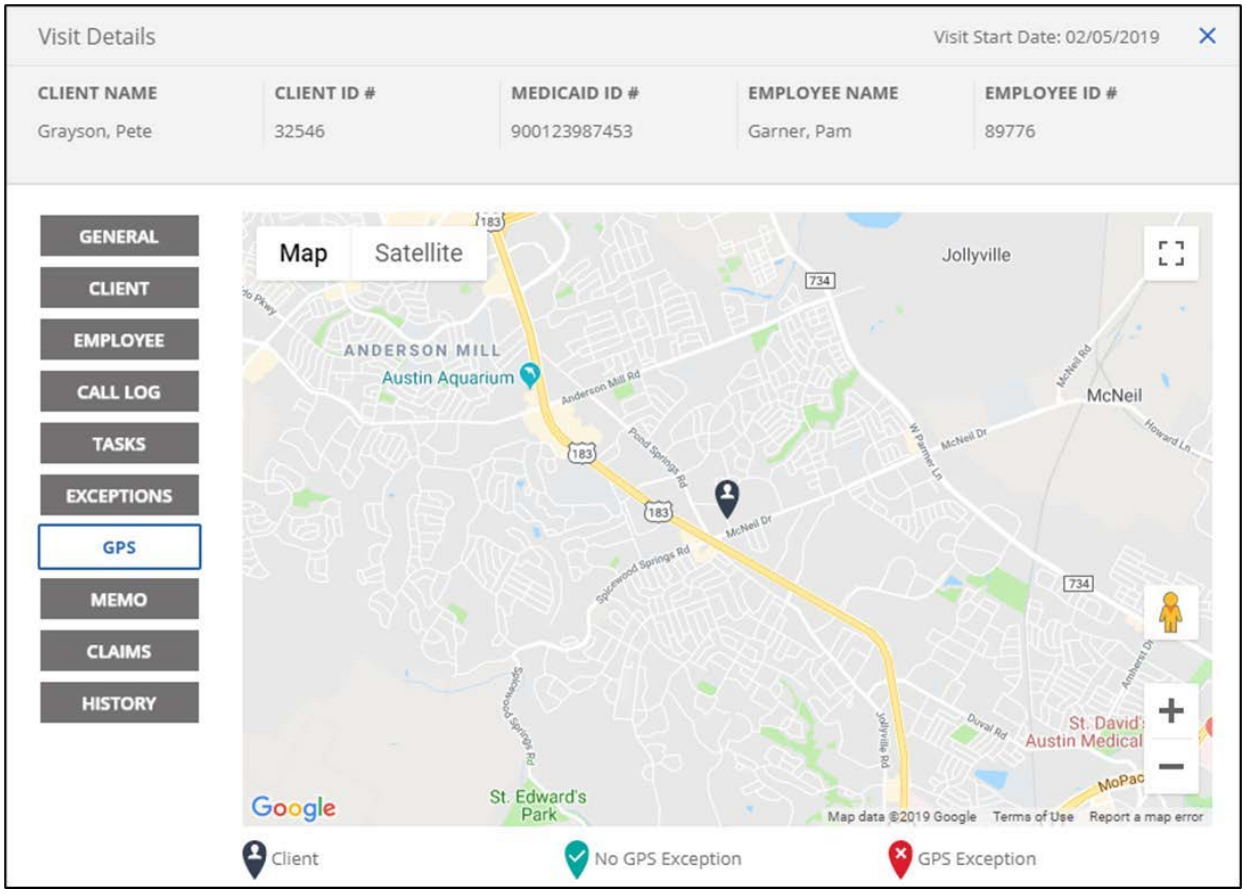
- In the **Visit Detail** screen, click **TASKS** on the left of the page.
- In the Add Task section, select which **TASK** you would like to add from the drop-down box.



- Select a **REASON CODE.**
- You may enter a **REASON NOTE** if you would like, however, it is not a required field.
- Click **ADD.**

The GPS Tab

Displays the location of the mobile app start and end times and your service address.

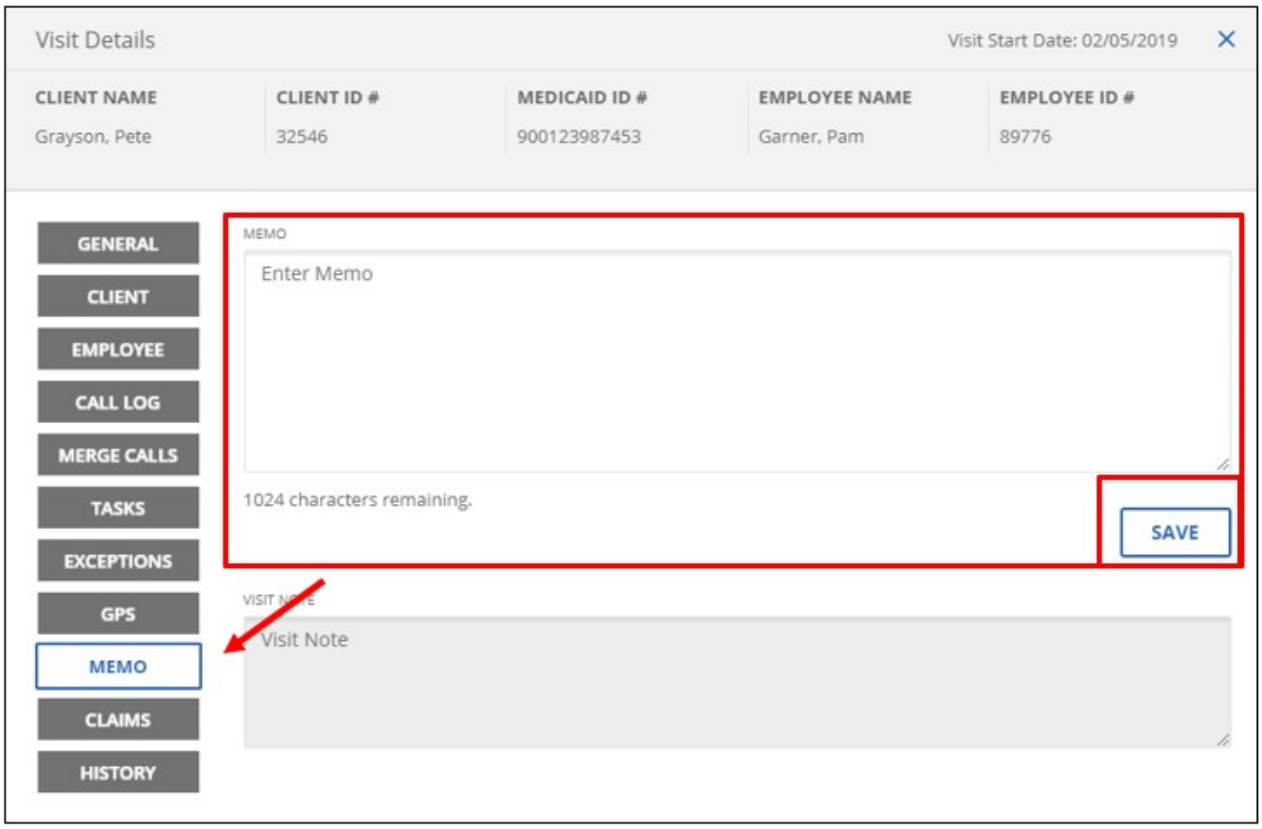


The MEMO Tab

You may enter notes about the visit. The **Visit Note** screen displays the notes entered in the mobile app at the end of the visit.

To Add a MEMO

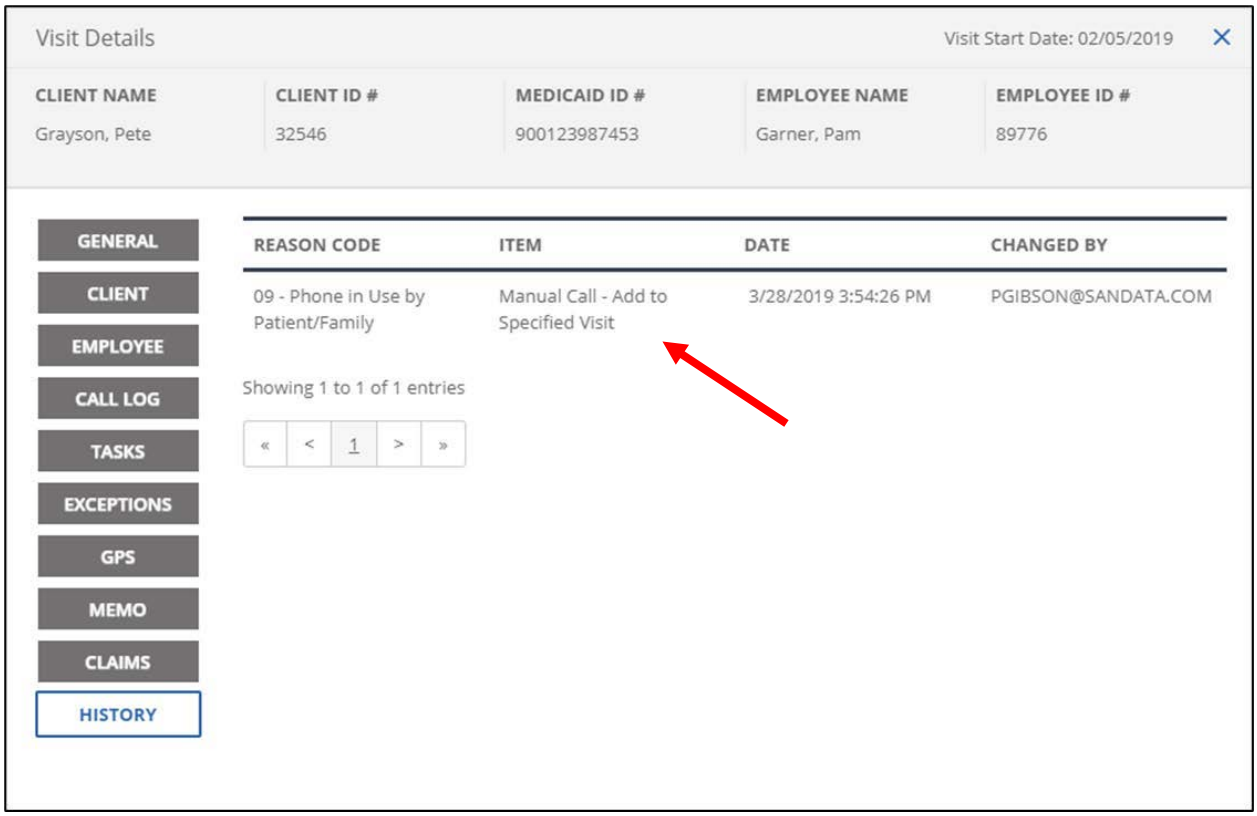
Type the visit note and click **SAVE**.



⚠️ The visit note should ***NOT*** be used to satisfy documentation requirements.

The History Tab

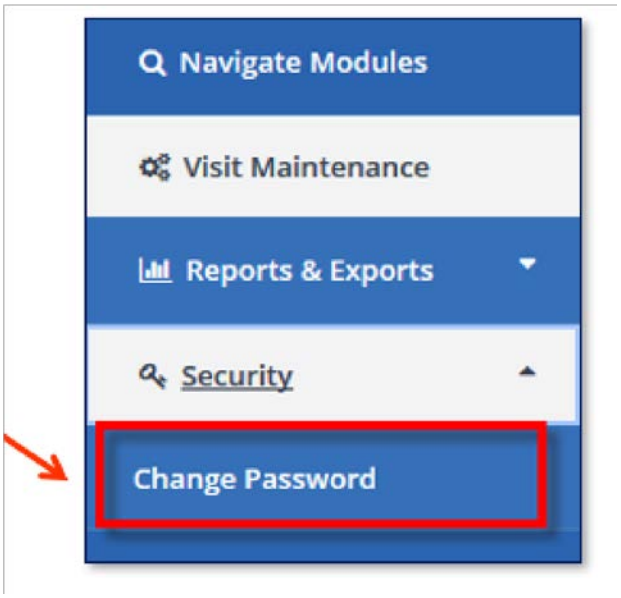
Displays visit history and any change made to the visit. The most recent changes appear at the top of the screen.



Security/Changing Your Password

You can change your password at any time.

- Click **Security** on the left of the page then, select **Change Password**.



Your EVV password <u>MUST</u> have at least:

- 1 Uppercase letter
- 1 Lowercase letter
- 1 Number
- 1 Special character (! @#$^&*)
- Be at least 12 characters long

Enter your **Old Password**

Enter a **New Password**

Enter the **New Password** *(again)*

Click **SAVE**

Contact Information:

Questions regarding the Sandata EVV system or updates to mailing addresses, phone numbers, or email addresses contact,

- **ARIS Solutions: (800) 798-1658 press #2 for EVV**
- **Email at EVV@arissolutions.org**