Electronic Visit Verification Guide

The Client'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 provide 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.

The Client

- The client (you) are 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 client can use the EVV website to correct visit start and end times, update details regarding services and print reports on past visits.

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.

- In the case when the client is a minor, the Designee is usually the client's parent, or another legally responsible adult.

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**

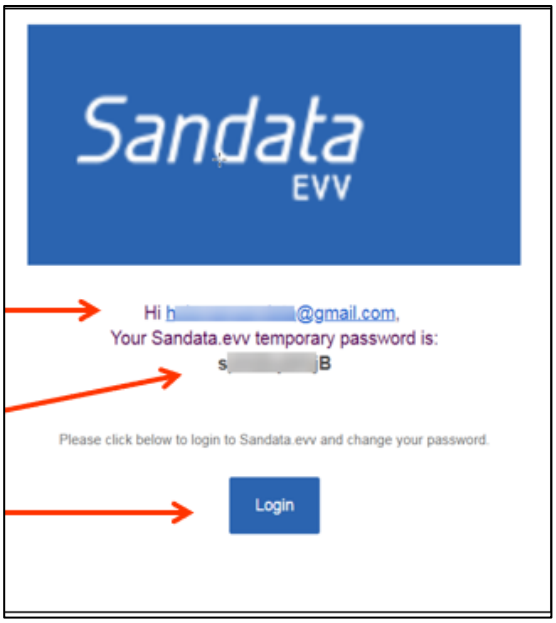
- Press the **ENTER** key
- The website login page will display

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.

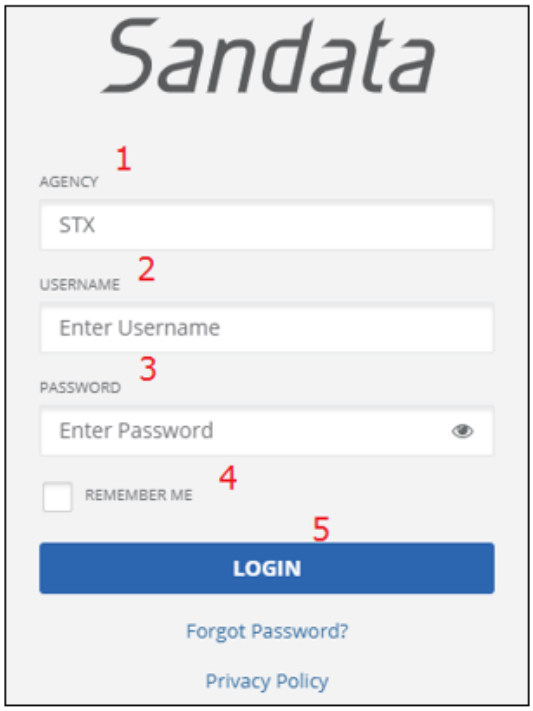
1. AGENCY

2. USERNAME

3. PASSWORD

4. REMEMBER ME

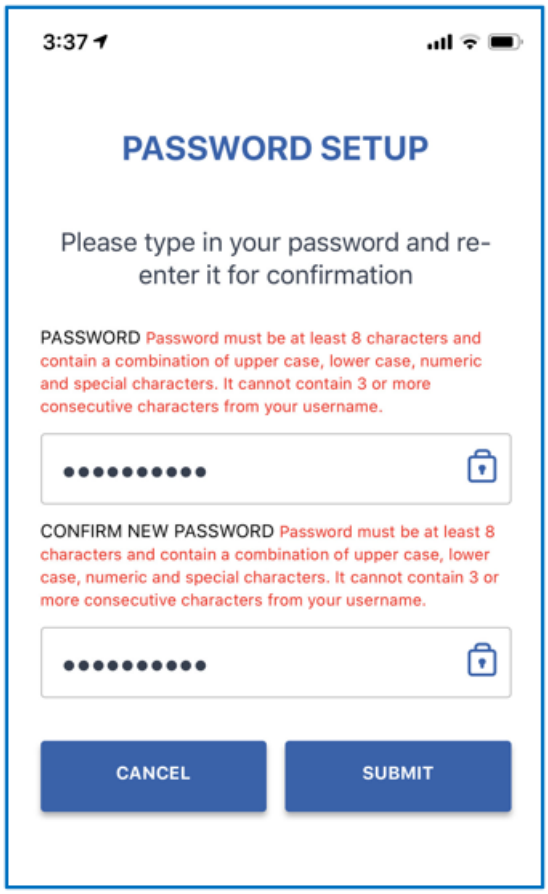
5. LOGIN



You will be asked to setup a new password.

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

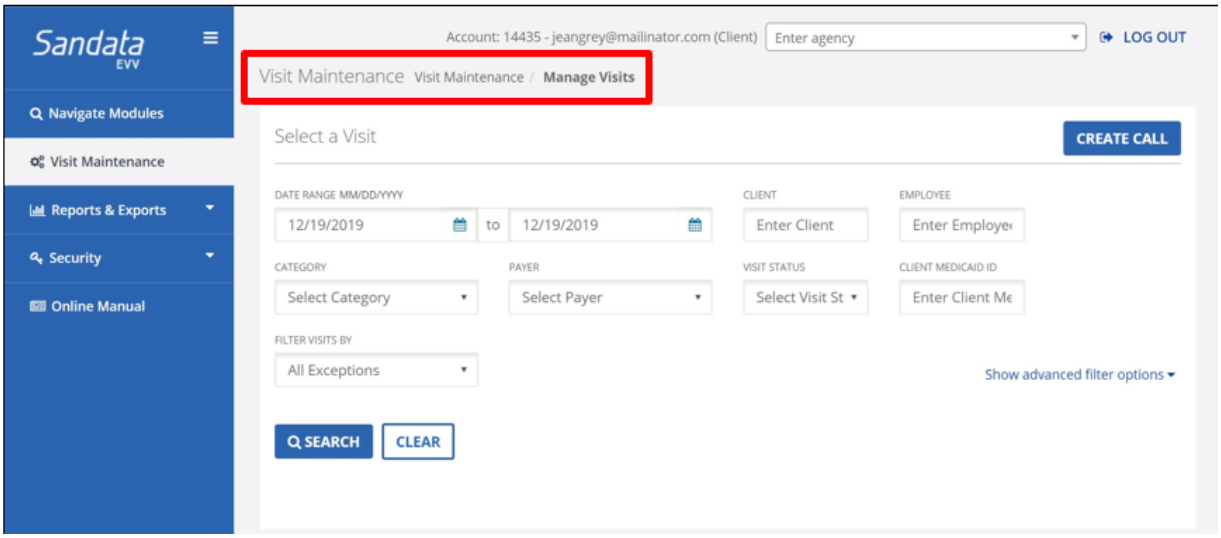
- 1 Uppercase letter
- 1 Lowercase letter
- 1 Number
- 1 Special character (! @#$^&*)
- Be at least 12 characters long



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 and the necessary changes to a visit if needed.



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. Usually this means that the client will need to edit the visit and add/change or merge certain information to put the visit into a verified state, which means the visit is clear of all exceptions.
2. Exceptions that *must* be <u>Acknowledged</u>
   a. An exception that needs to 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.

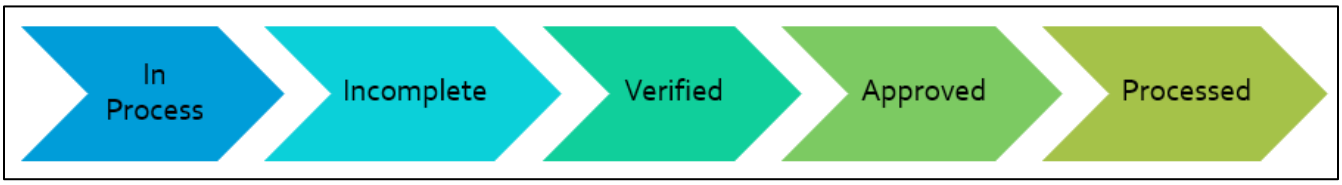
- **Missing Task** – The minimum number of tasks is missing.

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

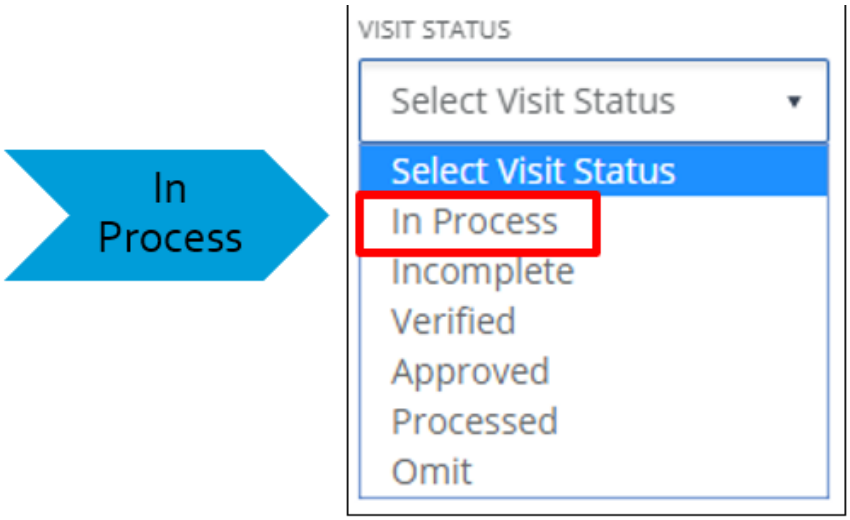
- **Visit without in-calls/out-calls** – The visit does not have a call-in and/or a call-out.

Visit Status

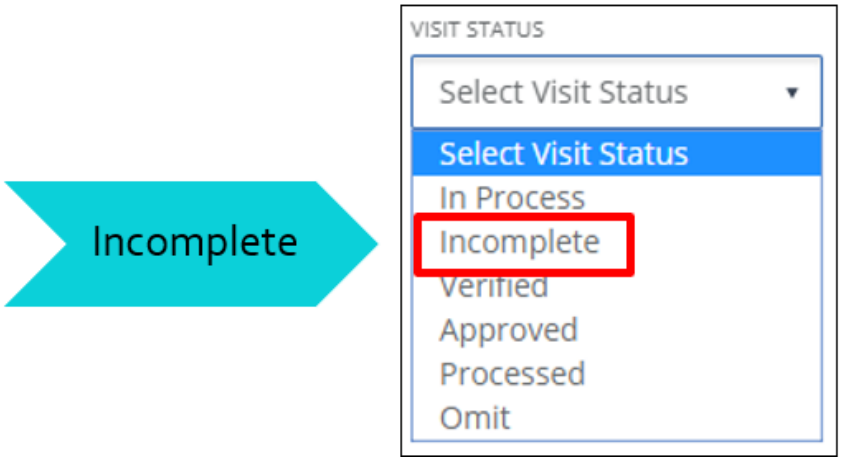
Each visit goes through statuses as information is received by the EVV system and actions are taken by either the client, designee or fiscal.



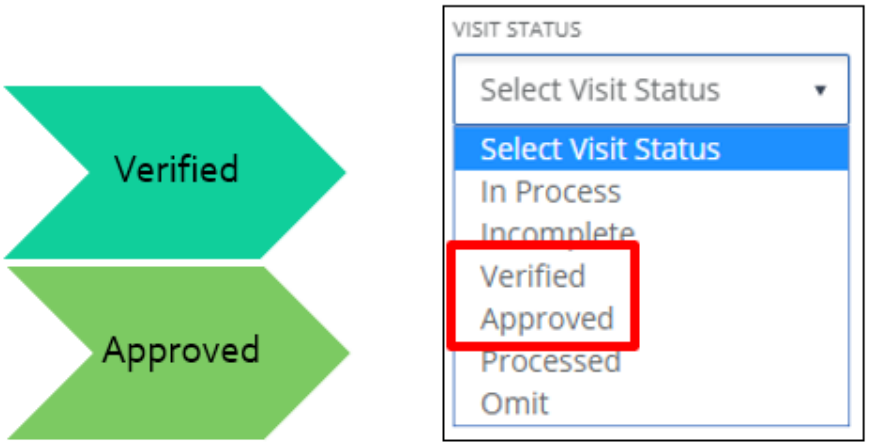
When an employee starts a visit, the visit status will be considered "IN PROGRESS".



When information is missing or cannot be verified, the visit status will show as "**Incomplete**".

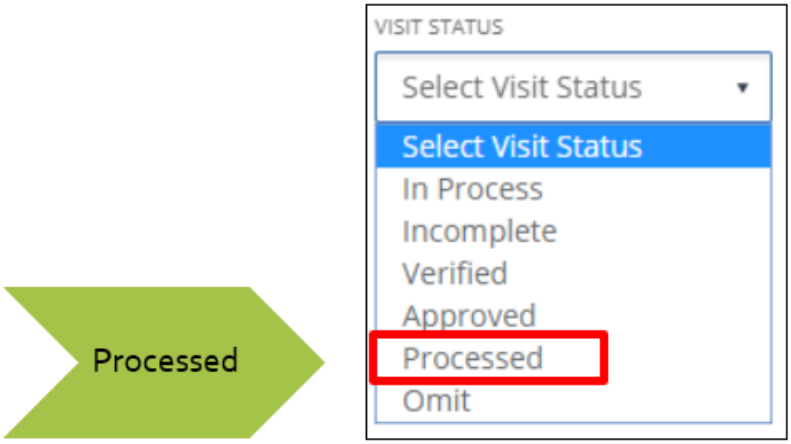


Once exceptions are fixed or acknowledged, the visit status will be "**Verified**".



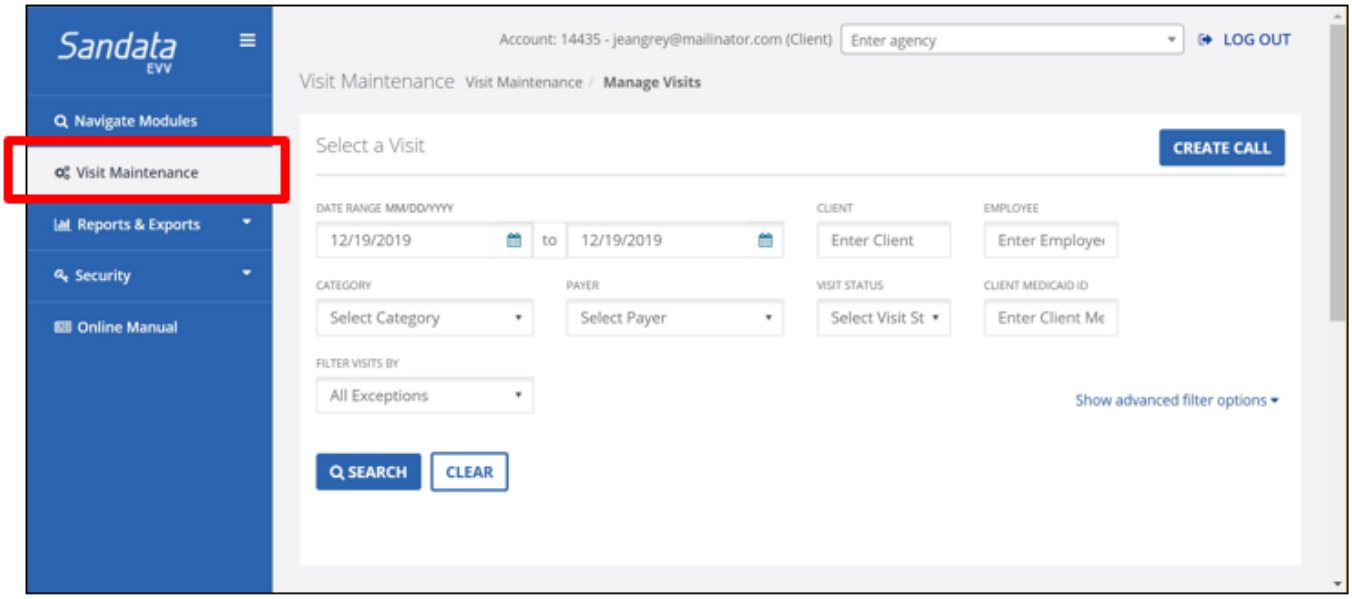
If the visit has been approved by the client or the designee, the visit status will show as "**Approved**".

If you are no longer using paper timesheets and the visit has been processed for payroll, the visit status will show as "**Processed**".

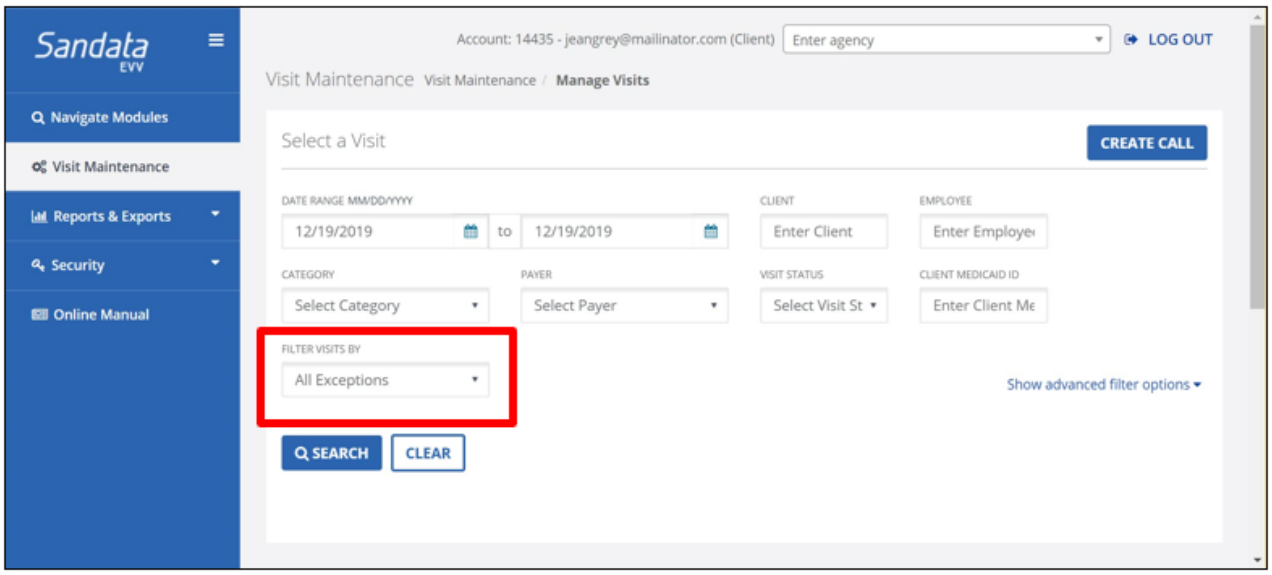


Reviewing Exceptions

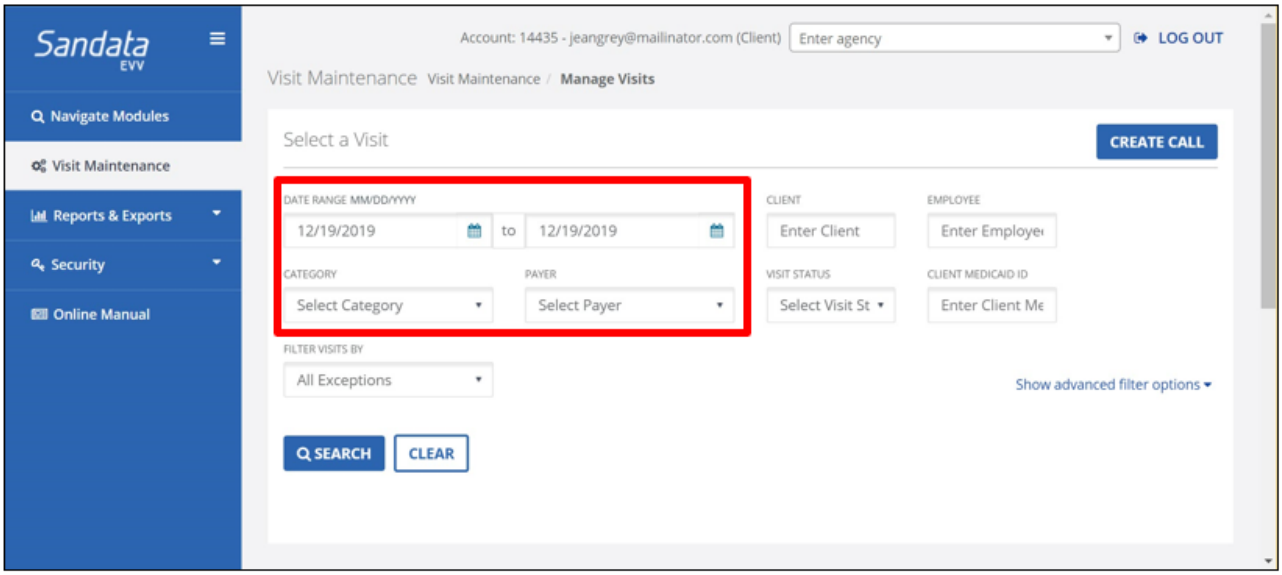
Click **Visit Maintenance** from the menu on the left



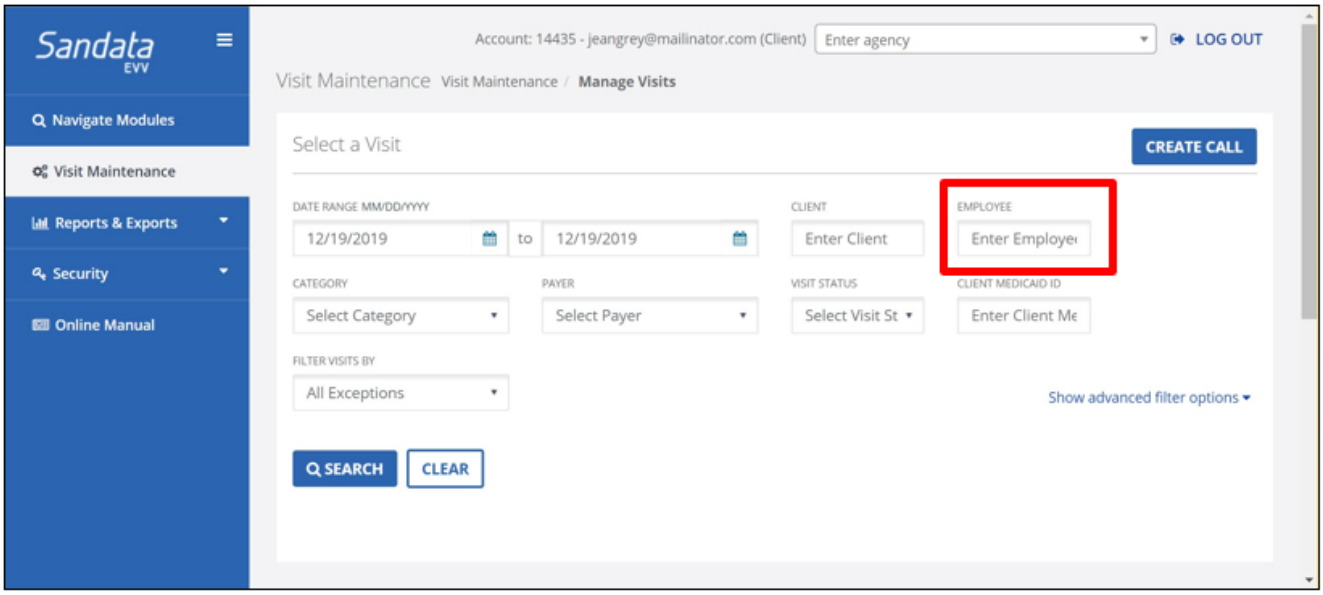
Use the "**All Exceptions**" filter to find visits with exceptions.



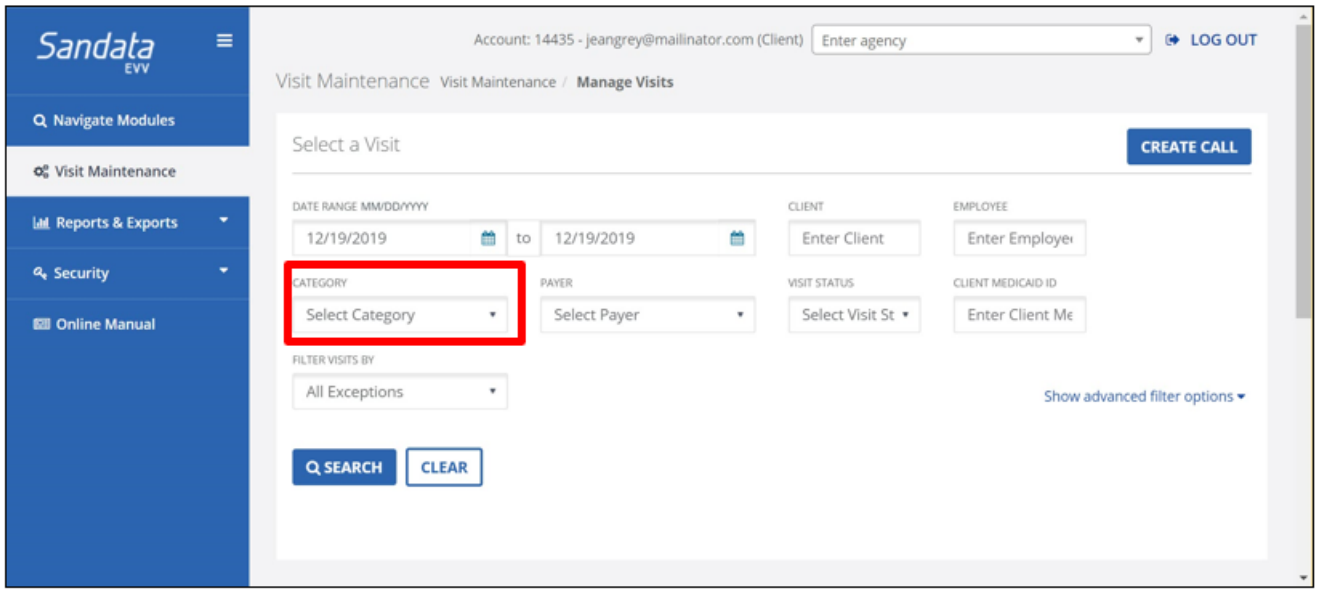
Data Range – The client can change the dates by clicking in the data field and typing the date or clicking on the calendar icon to select a date using the pop-up calendar.



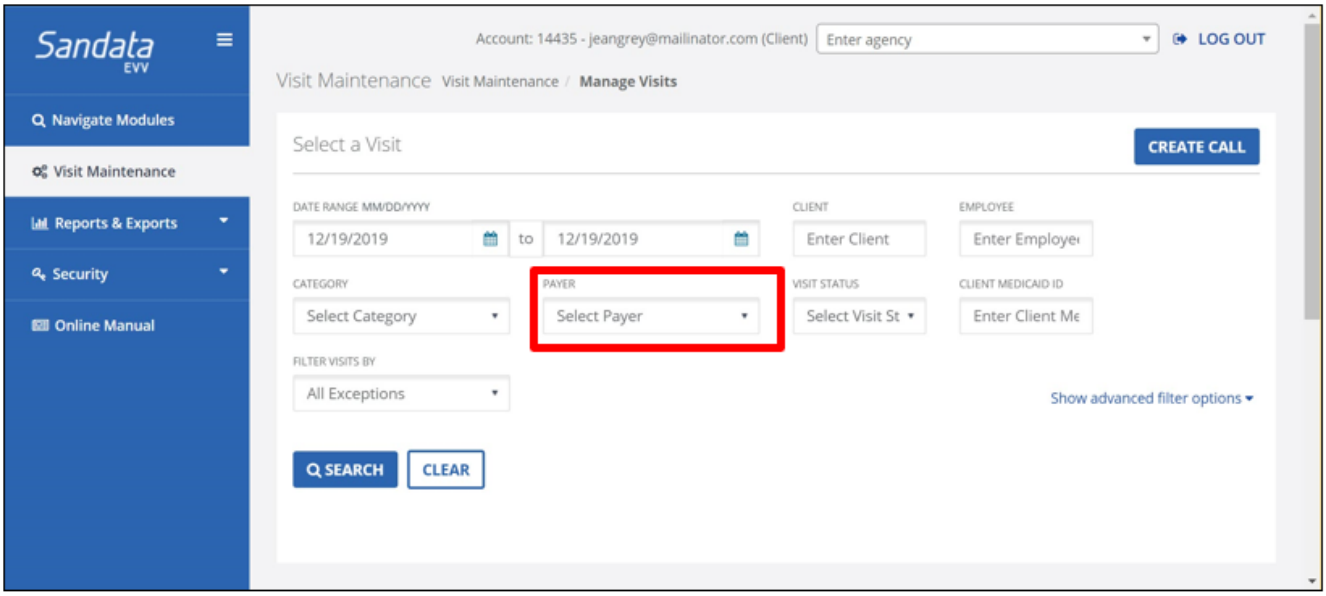
Employee – The client can enter all or part of the employee's name to see their visits.



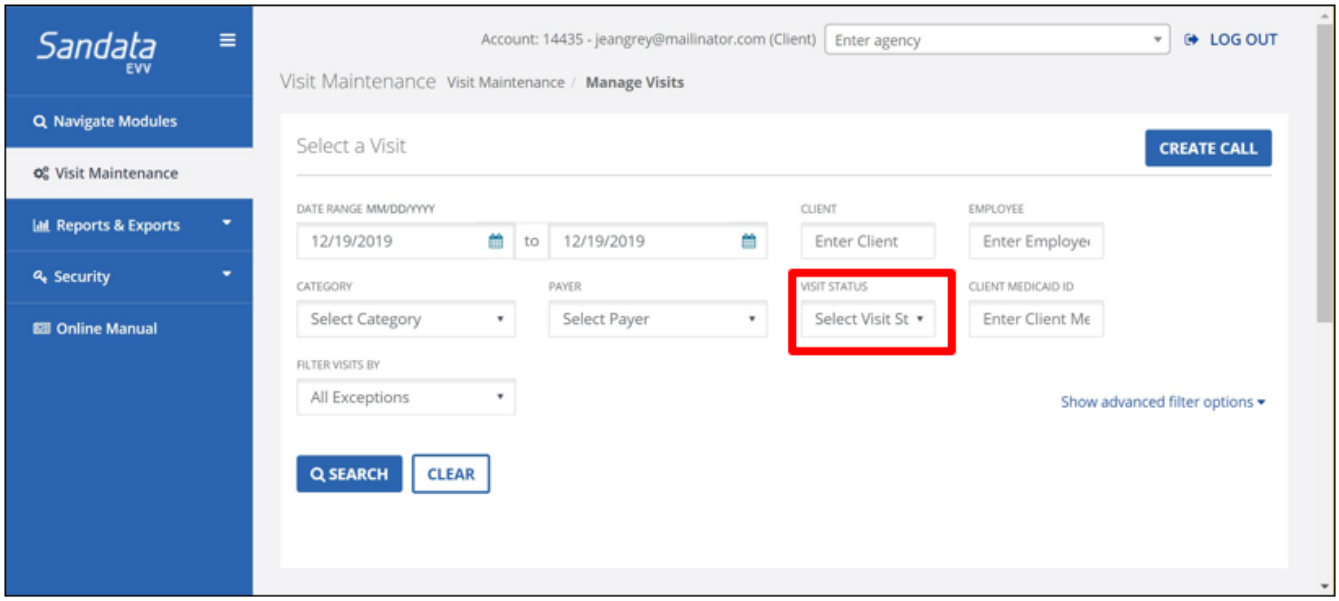
Category – Ignore this option, not used.



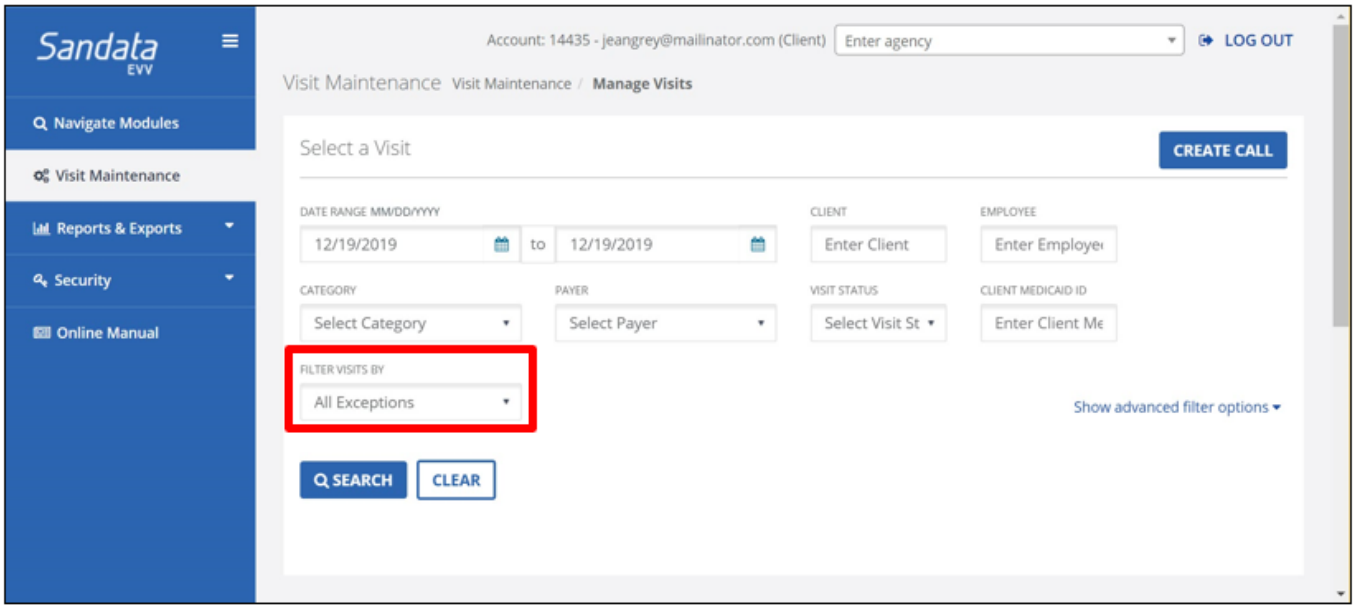
Payer - Ignore this option, not used.



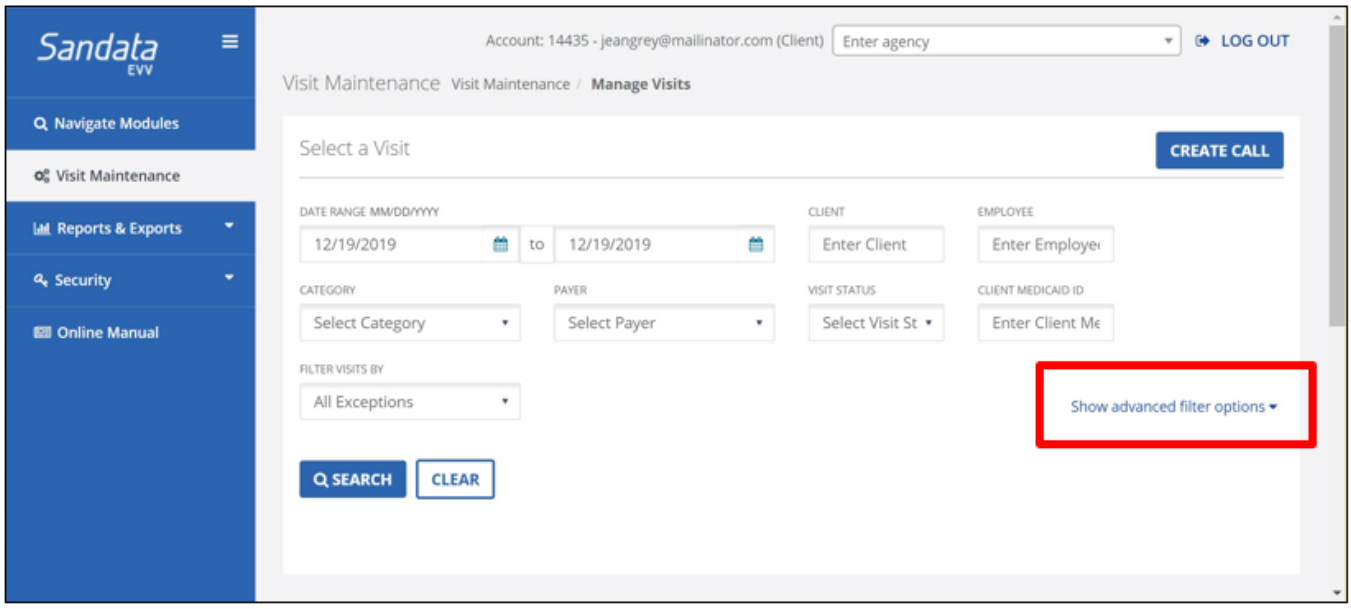
Visit Status – You can find visits by status, however, these may or may not have exceptions.



Filter Visits By – You can find all visits with exceptions or all visits with a specific type of exception.



Show Advanced Filter Options – You may ignore these filters options.

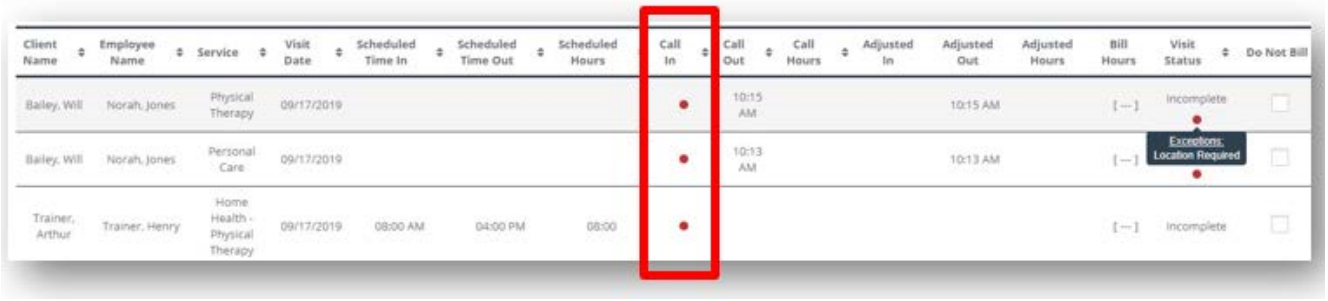


Exceptions Screen

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.

Fixing Exceptions

A red dot is displayed in the column where there is an exception.



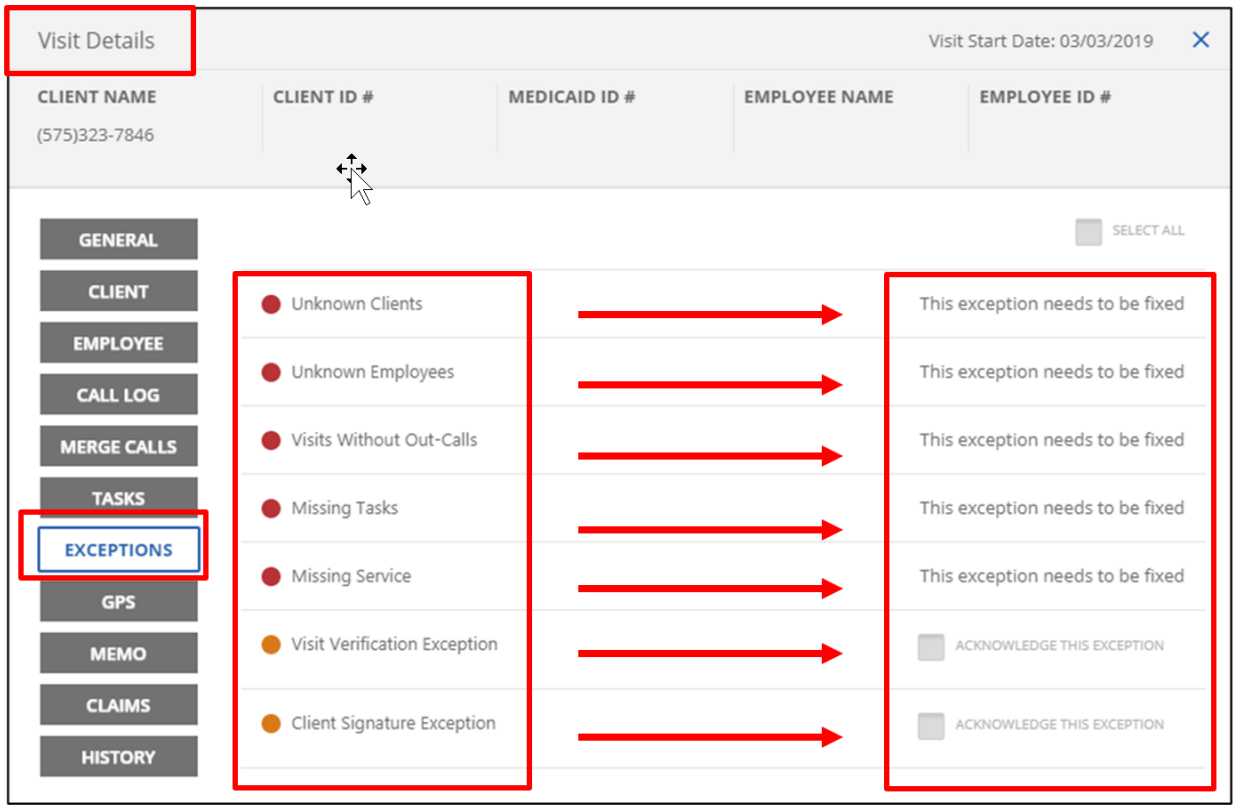
Client Name	Employee Name	Service	Visit Date	Scheduled Time In	Scheduled Time Out	Scheduled Hours	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill
Bailey, Will	Norah, Jones	Physical Therapy	09/17/2019				•	10:15 AM			10:15 AM		[---]	Incomplete •	
Bailey, Will	Norah, Jones	Personal Care	09/17/2019				•	10:13 AM			10:13 AM		[---]	Exceptions: Location Required •	
Trainer, Arthur	Trainer, Henry	Home Health - Physical Therapy	09/17/2019	08:00 AM	04:00 PM	08:00	•						[---]	Incomplete	

You can use your mouse and hover over the red dot to read more about the exception and what you need to do to correct it.

- You can click the column name to sort by that column.
- To view the details of a visit, either click on the visit line or the Edit icon.
- The Edit icon is located to the right of the visit line in the column name "**ACTIONS**".
- You may need to use the scroll bar located at the bottom of the page to move to the right to view the Edit icon.

Click on any red dot exception indicator to enter the **Visit Details** screen. All the exceptions for that visit will be listed, fixed and/or acknowledged here.

Click **EXCEPTIONS** on the left of the page.

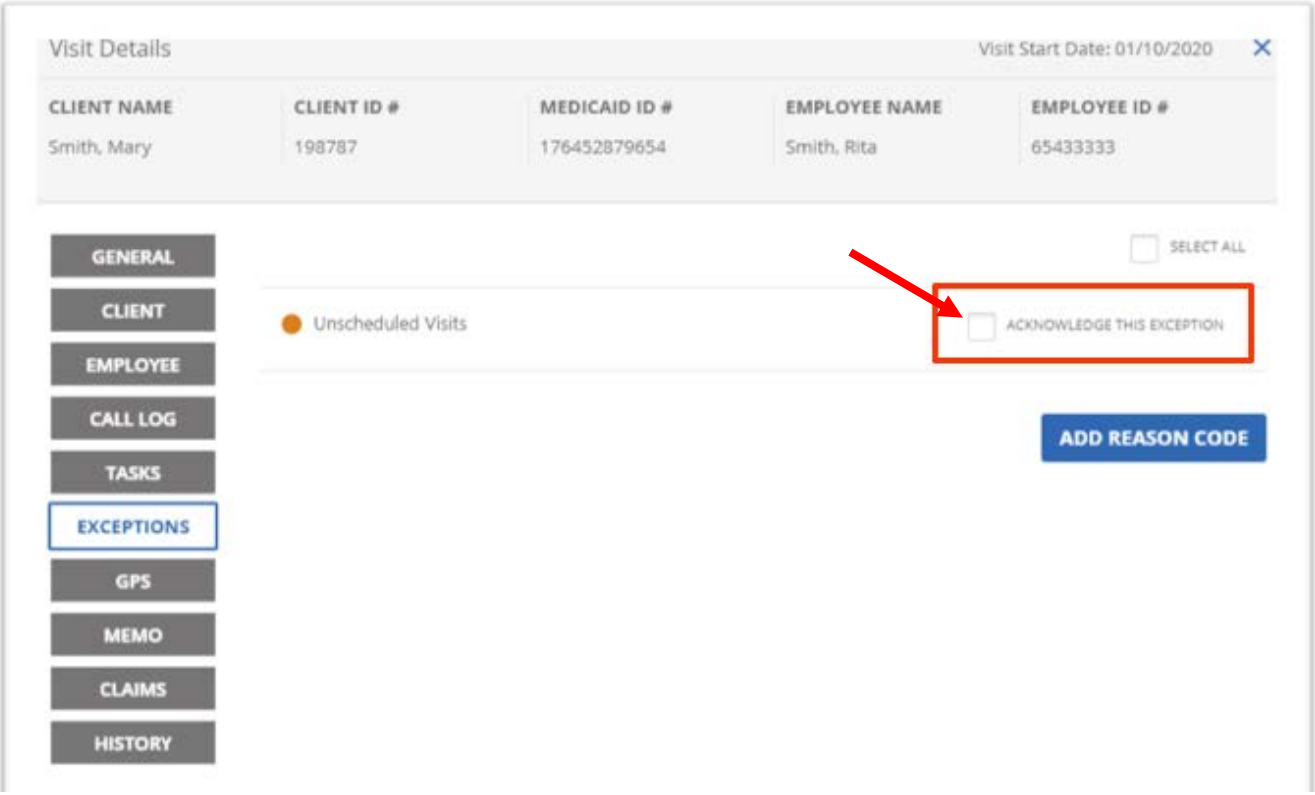


Both "**fixed**" and "**acknowledged**" exceptions are displayed on the right side of the Visit Details screen.

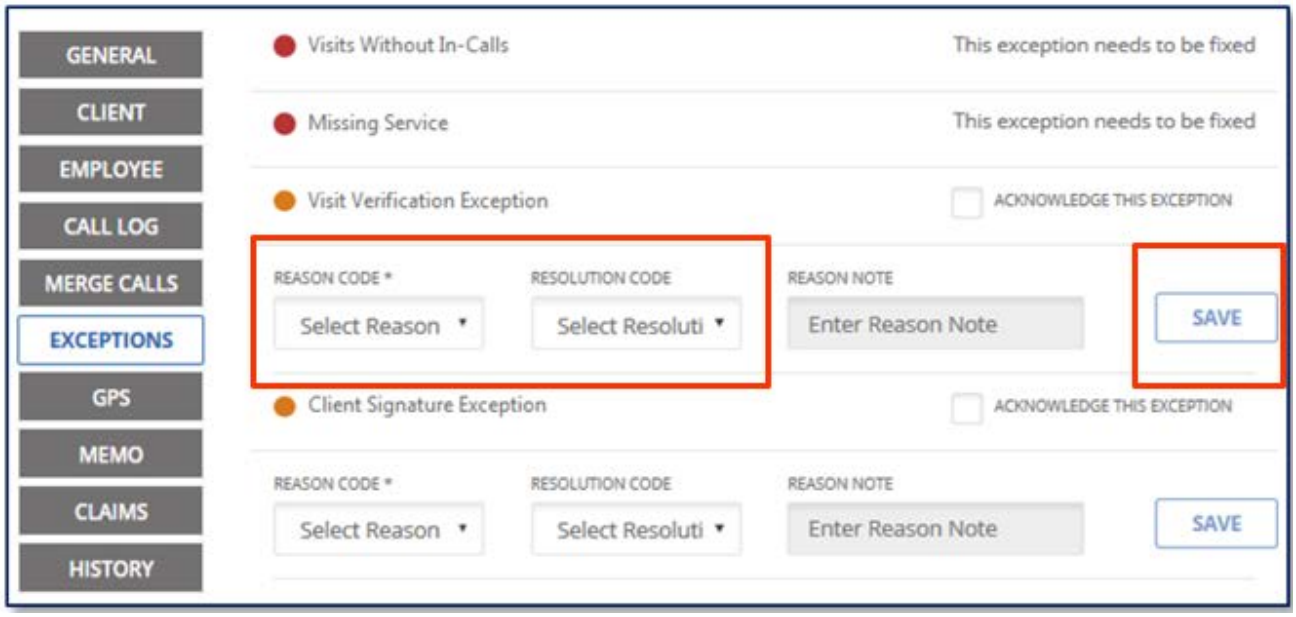
You can view additional information about the visits on the tabs on the left of the page in this screen *(Visits Details).*

Acknowledging an Exception

- Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox.
- Click the **ADD REASON CODE** button.



- Select the **REASON CODE** for the exception.
- Select the **RESOLUTION CODE** for the exception.



- Click **SAVE**

Fixing an Exception

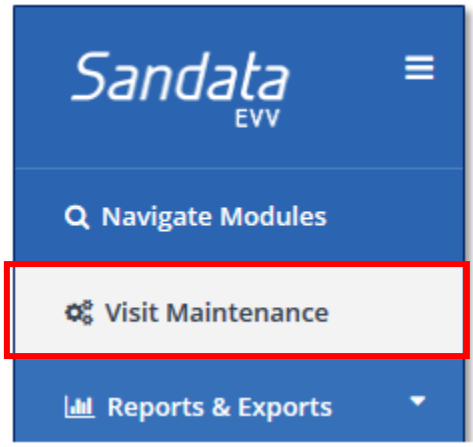
- Select the Exception to be *fixed*.
- Enter any **Missing Data** or **Modify Incorrect Data**.

Fixing Call Exceptions

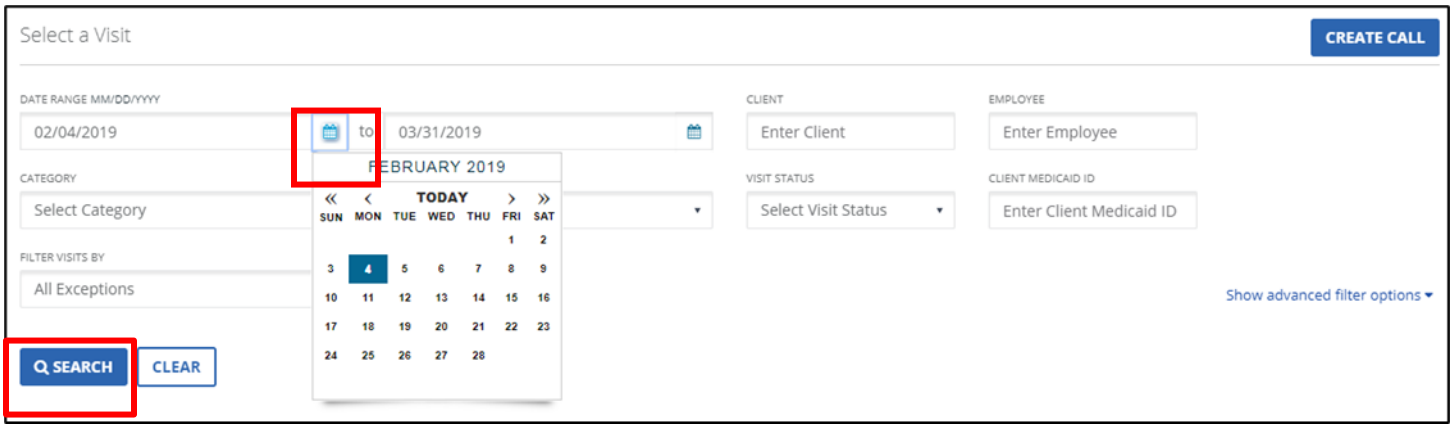
If a Call-in or Call-out times are missing, the exception **MUST** be fixed.

How to Add a Call-In or Call-Out

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



The **Manage Visits** screen displays



Select the date or date range to search and find the visit that needs to be adjusted.

Click either the visit or the Edit icon all the way to the right to view the details of the visit.

ee	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Pay Hours	Bill Hours	Visit Status	Do Not Bill	Approved	Actions
; Pam	PCA OVER-CFC/CHC	02/11/2019	●	10:08 AM					[---]	[---]	Incomplete	☐	☐	✎
; Pam	NURSE TRAINING-CFC	02/05/2019	10:46 AM	03:53 PM	05:07				05:00	05:07	Incomplete	☐	☐	✎
; Pam	NURSE TRAINING-CFC	02/05/2019	●	08:56 AM					[---]	[---]	Incomplete	☐	☐	✎

You might need to use the scroll bar at the bottom of the page to move to the right to see the Edit icon .

The Visit Details screen displays details, such as **CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME,** and **EMPLOYEE ID** for the visit.

Type in the adjusted dates for either the in or out calls along with the time.

Visit Details — Visit Start Date: 02/05/2019

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

GENERAL | CLIENT | EMPLOYEE | CALL LOG | MERGE CALLS | TASKS

VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
None	02/05/2019	America/New_York	Incomplete

CALL IN	CALL OUT	CALL HOURS
None	08:56 AM	None

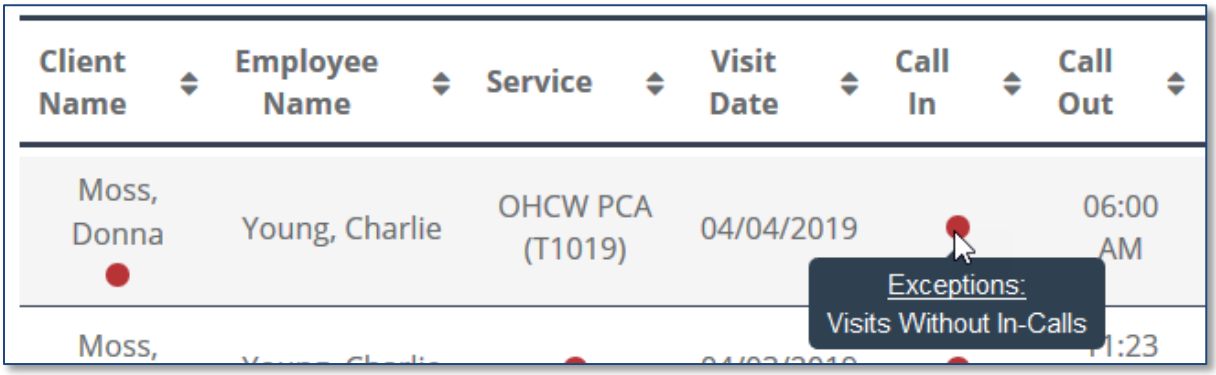
ADJUSTED IN DATE	ADJUSTED IN HH:MM AM/PM	ADJUSTED OUT DATE	ADJUSTED OUT HH:MM AM/PM
MM/DD/YYYY		02/05/2019	08:56 AM

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.**

When you click the exception indicator under the call time column, the *Visit Details* screen automatically opens to the *Call Log* screen.

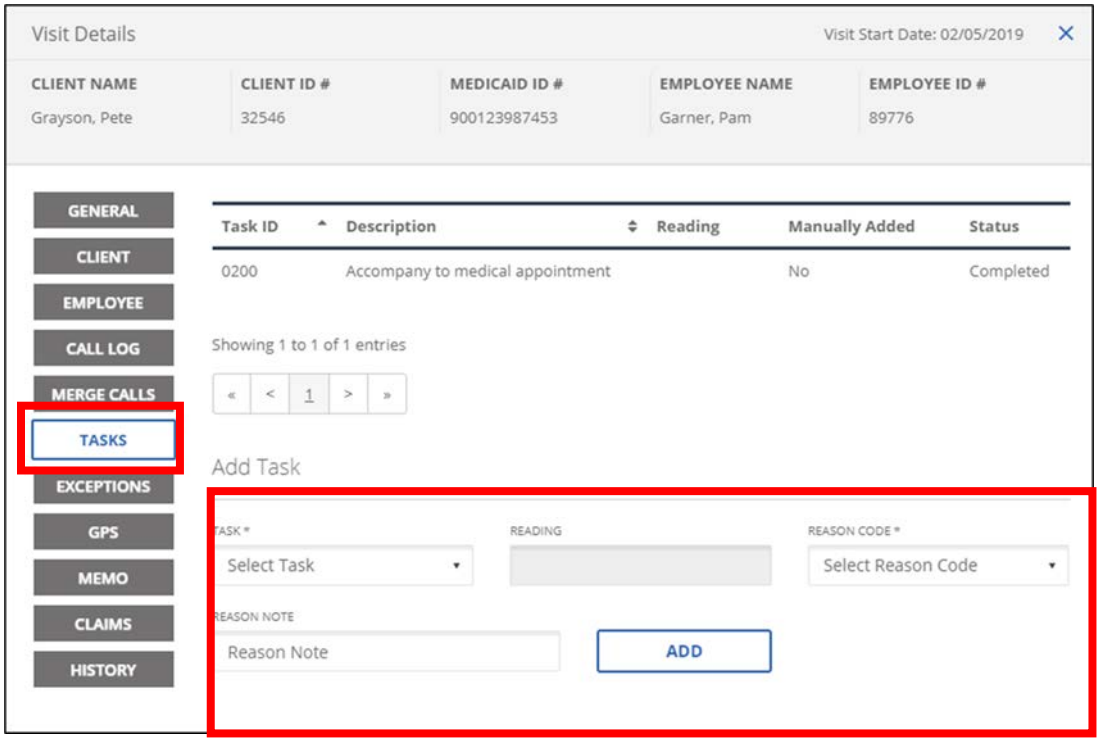


TASKS

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

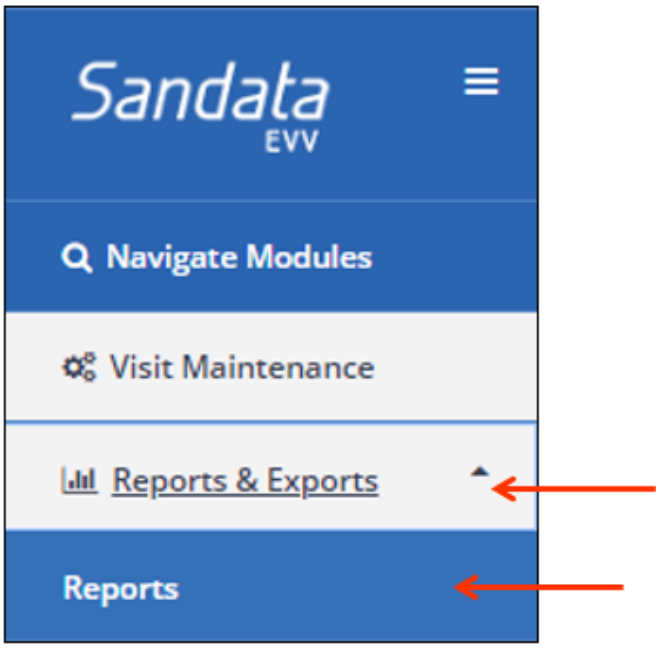
- In the **Visit Detail** screen, click **TASKS** on the left of the page.
- In the Add Task section, select which **TASK** you would like to add from the drop-down box.



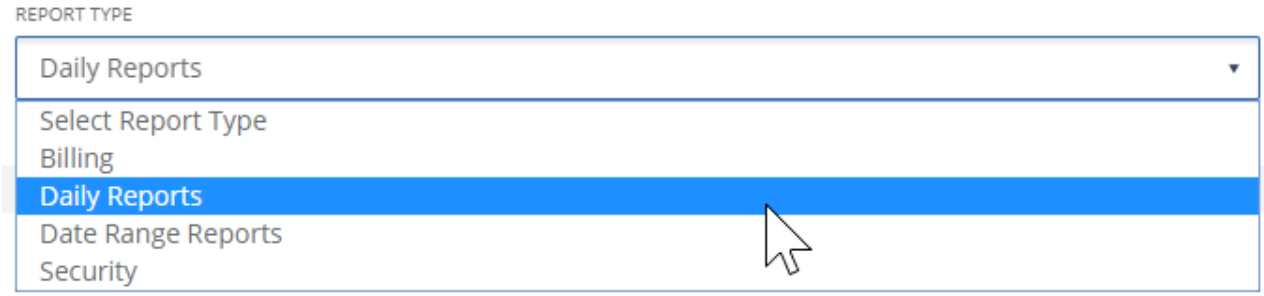
- Select a **REASON CODE.**
- You may enter a **REASON NOTE** if you would like, however, it is not a required field.
- Click **ADD.**

Running Reports

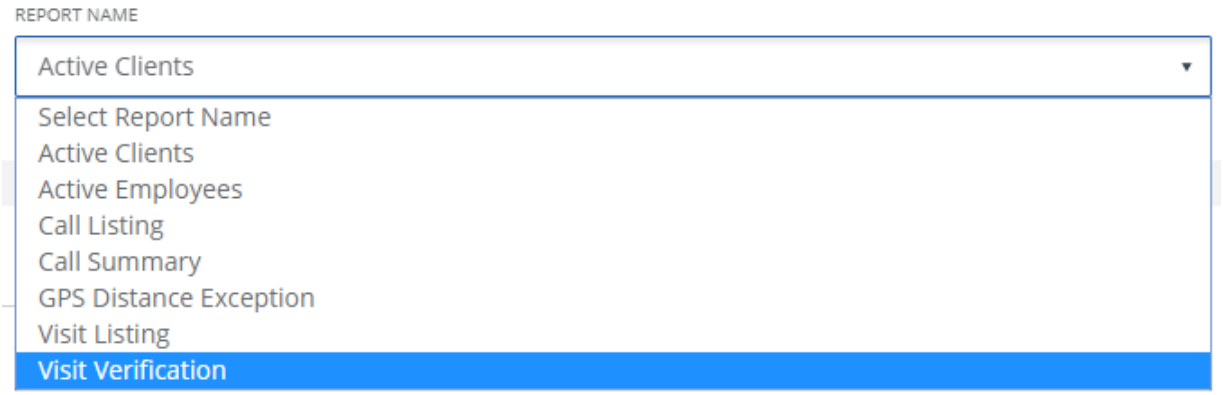
- You can run reports to help you manage your visits.
- The reports you run depend on your program.
- You can print reports or save reports to your computer to view at any time.
- Click **Reports & Exports**, then click **Reports**.



- Select the **REPORT TYPE**



- Then select the **Report Name**



- Select the **Timeframe** options.

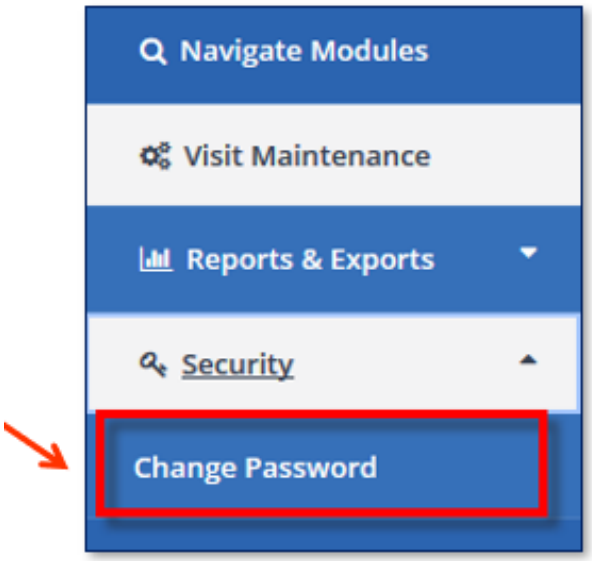
- Select **Parameters** (optional).

- Click **RUN REPORT**.

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