

# Your Key to EVV

Unlocking Electronic Visit Verification in Wisconsin



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We are halfway through 2021 and approaching the hard launch period of electronic visit verification (EVV) in Wisconsin. In this issue, the Wisconsin Department of Health Services (DHS) gives tips on how to use the **dashboard and reports from Sandata**.

## In the Know

To date, DHS has received over 1.3 million EVV visits since soft launch in November 2020. Provider agencies are collecting nearly 9,000 visits daily, and the Sandata EVV Portal allows them to dig into the collected information.

## Sandata EVV Portal Dashboard

Provider agencies can improve EVV use and success by getting submitted visits to a “verified” status. Verified visits have no flagged exceptions, or errors. The Sandata EVV Portal dashboard shows the daily number of two common errors (Unknown Clients and Unknown Employees). These errors can mean that workers don’t have the information they need to enter a visit correctly. Provider agencies can solve problems and prevent future ones by using the information available on the dashboard.

### Accessing and Using the Dashboard

Follow these steps to access and use the dashboard:

- Log in to the Sandata EVV Portal. Sandata’s dashboard is the first screen that appears after logging in. The data on the dashboard refreshes automatically every five minutes. (You can set it to refresh more or less often

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<https://www.dhs.wisconsin.gov/evv/index.htm>

This newsletter provides information about EVV in Wisconsin. The July 2020 ForwardHealth Update (2020-31), titled “[Implementation of Electronic Visit Verification for Personal Care and Supportive Home Care Services](#),” and the January 2021 Update (2021-05), titled “[Electronic Visit Verification Prior Authorization Procedure for Live-In Workers](#),” contain approved guidance.

if you want to.) All errors will appear in the Visit Maintenance screen where they can be fixed or acknowledged.

- Click the total error **number** to display those errors.
- Click the **name** of the error category to open the **Visit Maintenance** module and view or edit the visits with that error.
- Pro Tip: Open the Sandata EVV Portal in one web browser to make it easier to view the client or employee module **and** do the visit correction in another browser. Since your username/password will work on both browsers, you can look at them at the same time while correcting exceptions, saving changes, and refreshing each browser.

## Reports

Provider agencies can use reports to check that their clients, workers, and authorizations are all showing up correctly in Sandata. DHS sends updates to Sandata with this information every night, which shows in Sandata the next day. Provider agencies can see all of the updated information in different reports; some are listed along with their type below.

Find report options by clicking the Reports link on the Portal's left navigation panel. Under Select Report, choose the type of report and name desired.

**Note:** Reports referencing claims and scheduling do not provide any results. These functions are not part of Wisconsin DHS EVV.

### **Active Clients Report (Daily Reports)**

Use the Active Clients report to compare your client list to what is in Sandata. Make sure a client's address and phone number are accurate. Use this report to find Client IDs when employees need them to check in and check out.

### **Active Employees Report (Daily Reports)**

Use the Active Employees report to compare the names and emails of your employees to what is in Sandata. Checking information on this report can help provider agencies troubleshoot when a worker cannot log in or call in to Sandata.



### **Authorizations Report (Authorizations)**

Use the Authorizations report to check active authorizations in the Sandata system, view EVV authorizations that are about to expire, and view clients who don't have a current authorization.



### **Visit Verification Exception Report (Date Range Reports)**

The Visit Verification Exception report is based on visits with an "incomplete" status. When visits have flagged exceptions, the exceptions must be fixed or acknowledged to verify the visit. This is especially important so EVV data can be matched to claims data.

Exception information available on a Visit Verification Exception report can be used to:

- Show provider agencies where workers need more training.
- Highlight information that needs to be fixed. (For example, if an Unknown Client error shows up for telephonic visit verification calls to a certain client, double check that the client's phone number is correct in Sandata.)



### **Employee Visit Log Report (Date Range Reports)**

Use the Employee Visit Log report to see all verified visits recorded via EVV. It is a report based on dates with a maximum range of 31 days.

The Employee Visit Log report includes visit details like the service performed, check-in and check-out times, the visit status, worker and member IDs, the location where EVV was used, tasks, and client verification (signature or voice recording), if used. This report shows all required elements in a fee-for-service personal care worker record of care.

Find additional information about reports in Chapter 9 of the [Wisconsin Electronic Visit Verification Supplemental Guide](#). The Appendix of the Sandata Online Manual, available to administrators through the Sandata EVV Portal, gives a full description of all available reports.