

Maintaining EVV Visits and Other Helpful Information

The webinar has not yet begun.

For audio, make sure you call in per the event
instructions:

- Dial any one of these numbers:
(408) 243-5830, (646) 876-9923, or (669) 900-6833
- Enter the Webinar Number: **673-061-585**
- If prompted for an attendee ID, press #

Sound Test

We are testing sound at this time.

If you cannot hear the sound test, please check the volume on your speakers or listening device.

If you continue to have problems, a recorded webinar will be placed on the Ohio Department of Medicaid's website at:
[Medicaid.ohio.gov/EVV](https://www.Medicaid.ohio.gov/EVV)



Webinar Questions

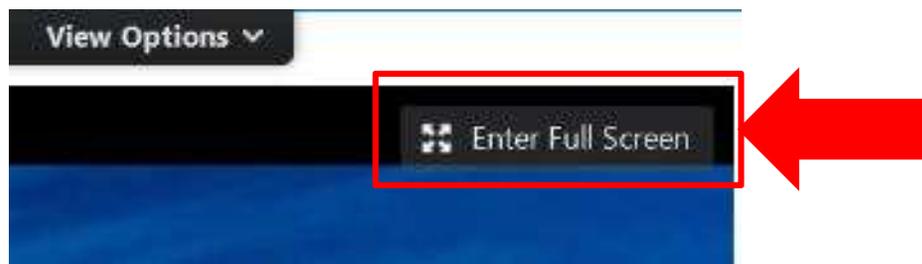
All attendees will be put on mute. To ask a question, you can select  and type your question in the box provided, on the bottom, right-hand side of the screen.

Your instructor and the EVV team will answer as many questions as possible during the time allotted, at the end of the webinar.

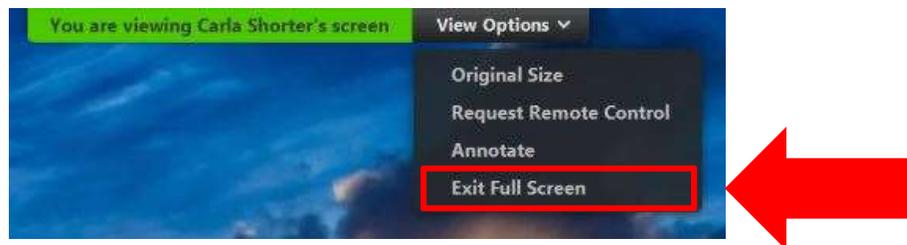


For easier viewing:

- You may click the Enter Full Screen button in the webinar window to make the presentation larger on your screen.



- To get back to the window where the Chat box displays, **hover over the top middle** of your screen to see the Webinar bar, click **View Options**, and click **Exit Full Screen**



Items to Cover

- How to clear exceptions on visits
- How to adjust visits
- How claims match to EVV visits
- Talking points when discussing EVV with individuals who receive EVV-eligible services

Visit Maintenance

Sandata EVV | Visit Maintenance / Manage Visits | Account: 9670 - user19670 | LOG OUT

Select a Visit

CREATE CALL

DATE RANGE MM/DD/YYYY: 10/22/2017 to 10/27/2017

CLIENT: Enter Client | EMPLOYEE: Enter Employee

CATEGORY: Select Category | PAYER: Select Payer | VISIT STATUS: Select Visit Status | CLIENT MEDICAID ID: Enter Client Medicaid ID

FILTER VISITS BY: All Exceptions

SEARCH CLEAR EXPORT

Show advanced filter options

« < 1 2 3 4 5 > »

Showing 1 to 50 of 221 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
(555)555-1307	Munoz, Rebecca	●	10/27/2017	05:32 PM	●					[...]	Incomplete	<input type="checkbox"/>	
(555)555-3366	Spector, Mark	●	10/27/2017	04:39 PM	●					[...]	Incomplete	<input type="checkbox"/>	
(555)555-8084	Germaine, Justin	●	10/27/2017	03:29 PM	●					[...]	Incomplete	<input type="checkbox"/>	
Morris, Jack	Healy, CLare	G0156	10/27/2017	02:25 PM	●					[...]	Incomplete	<input type="checkbox"/>	
Clark, Richard	Muir, Jane	G0156	10/27/2017	02:21 PM	05:30 PM	03:09				03:09	Incomplete	<input type="checkbox"/>	

Sandata EVV | Visit Maintenance / Manage Visits | Account: 9670 - user19670 | LOG OUT

Select a Visit CREATE CALL

DATE RANGE MM/DD/YYYY: 10/22/2017 to 10/27/2017

CLIENT: Enter Client | EMPLOYEE: Enter Employee

CATEGORY: Select Category | PAYER: Select Payer | VISIT STATUS: Select Visit Status | CLIENT MEDICAID ID: Enter Client Medicaid ID

FILTER VISITS BY: All Exceptions

SEARCH CLEAR EXPORT

Show advanced filter options

FILTER VISITS BY

- All Exceptions
- Exception Types
- All Visits

VISIT STATUS

- Select Visit Status
- In Process
- Incomplete
- Verified
- Processed
- Omit

Visit Maintenance / Visit Maintenance / **Manage Visits** Account: 9670 - user19670 [LOG OUT](#)

Select a Visit **CREATE CALL**

DATE RANGE MM/DD/YYYY
10/22/2017 to 10/27/2017

CLIENT: Enter Client EMPLOYEE: Enter Employee

CATEGORY: Select Category PAYER: Select Payer VISIT STATUS: Select Visit Status CLIENT MEDICAID ID: Enter Client Medicaid ID

FILTER VISITS BY: Exception Types

EXCEPTION TYPES: Select Exception Type

- CLIENT SIGNATURE EXCEPTION
- GPS DISTANCE EXCEPTION
- MISSING SERVICE
- SERVICE VERIFICATION EXCEPTION
- UNKNOWN CLIENTS
- UNKNOWN EMPLOYEES
- UNMATCHED CLIENT ID / PHONE
- VISIT VERIFICATION EXCEPTION

SEARCH:

EXPORT:

Show advanced filter options

Show: 50 per page Show Display Options

Showing 1 to 50 of 221 entries

Client Name	Employee Name	Service	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
-------------	---------------	---------	-------------	--------------	----------------	------------	--------------	-------------	---------

FILTER VISITS BY

All Visits

Show advanced filter options

SEARCH CLEAR

EXPORT

Show: 50 per page Show Display Options

Showing 1 to 50 of 223 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
Woods, Kayla	Muir, Jane	T1019	10/26/2017	03:12 PM	03:46 PM	00:34				00:34	Verified	<input type="checkbox"/>	
Woods, Kayla	Muir, Jane	S5125	10/27/2017	11:09 AM	11:14 AM	00:05				00:05	Verified	<input type="checkbox"/>	
Simmons, Clar	Lopez, Kelly	G0300	10/22/2017	08:58 AM	12:30 PM	03:32				03:32	Incomplete	<input type="checkbox"/>	

CATEGORY: Select Category

PAYER: Select Payer

VISIT STATUS: Verified

CLIENT MEDICAID ID: Enter Client Medicaid IE

FILTER VISITS BY: All Visits

Show advanced filter options

SEARCH CLEAR

EXPORT

Show: 50 per page Show Display Options

Showing 1 to 2 of 2 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
Woods, Kayla	Muir, Jane	T1019	10/26/2017	03:12 PM	03:46 PM	00:34				00:34	Verified	<input type="checkbox"/>	
Woods, Kayla	Muir, Jane	S5125	10/27/2017	11:09 AM	11:14 AM	00:05				00:05	Verified	<input type="checkbox"/>	

Select a Visit **CREATE CALL**

DATE RANGE MM/DD/YYYY
10/22/2017  to 10/27/2017 

CLIENT EMPLOYEE

CATEGORY PAYER VISIT STATUS CLIENT MEDICAID ID

FILTER VISITS BY Show advanced filter options ▾

SEARCH

No Data Found!

DATE RANGE MM/DD/YYYY

10/22/2017 to 10/27/2017

CLIENT: **shaw**

EMPLOYEE: Enter Employee

CATEGORY: Select Category

PAYER: Select Payer

VISIT STATUS: Select Visit Status

CLIENT MEDICAID ID: Enter Client Medicaid ID

FILTER VISITS BY: All Exceptions

SEARCH CLEAR EXPORT

Show advanced filter options

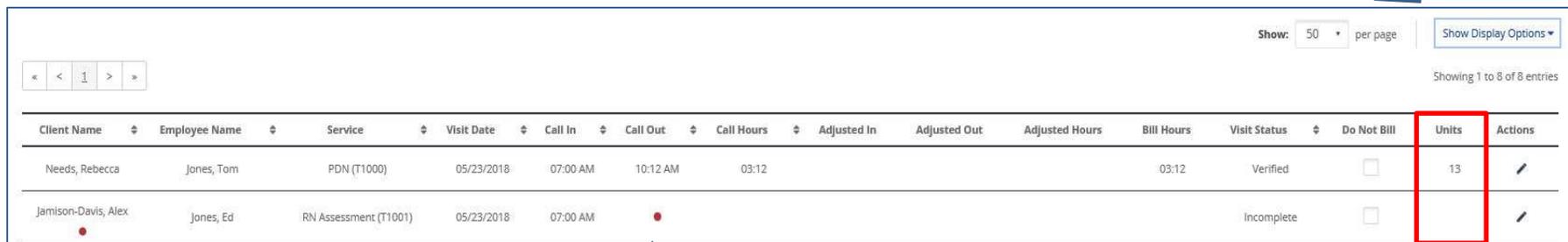
Show: 50 per page Show Display Options

Showing 1 to 5 of 5 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
Shaw, Lily	LaManna, Fred	G0300	10/23/2017	12:11 PM	04:08 PM	03:57				03:57	Incomplete	<input type="checkbox"/>	
Shaw, Lily	LaManna, Fred	G0300	10/24/2017	04:04 PM	08:06 PM	04:02				04:02	Incomplete	<input type="checkbox"/>	
Shaw, Lily	LaManna, Fred	G0300	10/25/2017	01:39 PM	05:42 PM	04:03				04:03	Incomplete	<input type="checkbox"/>	

How to see column with Units information:

You need to adjust the Show Display Options to see the new Units calculation column. You can do this, today!



Showing 1 to 8 of 8 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Units	Actions
Needs, Rebecca	Jones, Tom	PDN (T1000)	05/23/2018	07:00 AM	10:12 AM	03:12				03:12	Verified	<input type="checkbox"/>	13	
Jamison-Davis, Alex	Jones, Ed	RN Assessment (T1001)	05/23/2018	07:00 AM							Incomplete	<input type="checkbox"/>		

Note: As long as there is **both** a **Call In** and **Call Out** for the visit, Units will be calculated and displayed in the column.

How to see column with Units information:

Step 1

« < 1 > »

Show: 50 per page **Show Display Options**

Showing 1 to 8 of 8 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Units	Actions
-------------	---------------	---------	------------	---------	----------	------------	-------------	--------------	----------------	------------	--------------	-------------	-------	---------

Show: 50 per page Hide Display Options

Step 3

- Client ID
- Client Name
- Santrax ID
- Program
- Supervisor
- Scheduled Time Out
- Call Out
- Pay Hours
- Visit Status
- Claims Verification Status
- Group Visit Code
- Client Medicaid ID
- Employee Name
- Employee Contact Phone Number
- Service
- Visit Date
- Scheduled Hrs
- Call Hours
- Bill Hours
- Memo
- Do Not Bill
- Client Primary Phone Number
- Employee ID
- Payer
- Agency
- Scheduled Time In
- Call In
- Adjusted Hours
- Tasks
- Client Verified
- Units**

Step 2

How to see column with Units information:

Sandata EVV Visit Maintenance / Manage Visits Account: 9670 - user19670 LOG OUT

Select a Visit CREATE CALL

DATE RANGE MM/DD/YYYY: 10/22/2017 to 10/27/2017

CLIENT: Enter Client EMPLOYEE: Enter Employee

CATEGORY: Select Category PAYER: Select Payer VISIT STATUS: Select Visit Status CLIENT MEDICAID ID: Enter Client Medicaid ID

FILTER VISITS BY: All Exceptions

SEARCH CLEAR EXPORT

Step 4 Show advanced filter options

Hide Advanced Filter Options

CLIENT ID #: Enter Client ID # EMPLOYEE ID #: Enter Employee ID # PAYER: All PROGRAM: All

SERVICE: All CALL TYPE: All SUPERVISOR: Enter Supervisor GROUP VISIT CODE: Select Group Visit

Step 5 SAVE SETTINGS RESET

DATE RANGE MM/DD/YYYY

10/22/2017 to 10/27/2017

CLIENT: **shaw**

EMPLOYEE: Enter Employee

CATEGORY: Select Category

PAYER: Select Payer

VISIT STATUS: Select Visit Status

CLIENT MEDICAID ID: Enter Client Medicaid ID

FILTER VISITS BY: All Exceptions

SEARCH CLEAR EXPORT

Show advanced filter options

Show: 50 per page Show Display Options

Showing 1 to 5 of 5 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
Shaw, Lily	LaManna, Fred	G0300	10/23/2017	12:11 PM	04:08 PM	03:57				03:57	Incomplete	<input type="checkbox"/>	
Shaw, Lily	LaManna, Fred	G0300	10/24/2017	04:04 PM	08:06 PM	04:02				04:02	Incomplete	<input type="checkbox"/>	
Shaw, Lily	LaManna, Fred	G0300	10/25/2017	01:39 PM	05:42 PM	04:03				04:03	Incomplete	<input type="checkbox"/>	

“General”
is like a
Visit
Summary

Visit Details Visit Start Date: 10/27/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Shaw, Lily	99960	111524398649	LaManna, Fred	

GENERAL (highlighted)

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

VISIT START DATE: None

VISIT END DATE: 07/18/2019

VISIT TIME ZONE: US/Eastern

VISIT STATUS: Incomplete

CALL IN: None

CALL OUT: 02:05 PM

CALL HOURS: None

UNITS: None

ADJUSTED IN DATE: MM/DD/YYYY

ADJUSTED IN HH:MM AM/PM:

ADJUSTED OUT DATE: 07/18/2019

ADJUSTED OUT HH:MM AM/PM: 02:05 PM

AGENCY ID: 25090

AGENCY NAME: Test p1 to p2 Agency

BILL HOURS:

PAYER: ODA

PROGRAM: PP

SERVICE: Passport HCA (S5

GROUP VISIT CODE:

CLIENT VERIFIED TIME: No

CLIENT VERIFIED SERVICE: Yes

CLIENT SIGNATURE: Yes

VISIT SOURCE: SANDATA

GENERATE GROUP VISIT CODE

Visit Details Visit Start Date: 10/27/2017 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Shaw, Lily	99960	111524398649	LaManna, Fred	

GENERAL		CALL IN		CLIENT ID#	
GENERAL		CALL DATE	CALL TIME	CALL TYPE	SERVICE
CLIENT		10/27/2017	02:20 PM	EW (telephony)	N/A
EMPLOYEE		USER	ORIGINATING PHONE #		CALL SOURCE
CALL LOG		009914585	(555) 555-2073		SANDATA
EXCEPTIONS		CALL OUT			CLIENT ID#
GPS		CALL DATE	CALL TIME	CALL TYPE	SERVICE
MEMO		10/27/2017	05:47 PM	EW (telephony)	G0300
CLAIMS		USER	ORIGINATING PHONE #		CALL SOURCE
HISTORY		009914585	(555) 555-2073		SANDATA

CANCEL

Visit Details Visit Start Date: 10/27/2017 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Shaw, Lily	99960	111524398649	LaManna, Fred	

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- EXCEPTIONS
- GPS**
- MEMO
- CLAIMS
- HISTORY

Map data ©2018 Google

Client No GPS Exception GPS Exception

Visit Details Visit Start Date: 10/27/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Shaw, Lily	99960	111524398649	LaManna, Fred	

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

- Visit Verification Exception ACKNOWLEDGE THIS EXCEPTION

- Client Signature Exception ACKNOWLEDGE THIS EXCEPTION

- Service Verification Exception ACKNOWLEDGE THIS EXCEPTION

REASON CODE *	RESOLUTION CODE	REASON NOTE	
Select Reason Coi ▾	Select Resolution ▾	Enter Reason Note	SAVE

Visit Details Visit Start Date: 10/27/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Shaw, Lily	99960	111524398649	LaManna, Fred	

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- MERGE CALLS
- EXCEPTIONS**
- GPS
- MEMO
- CLAIMS
- HISTORY

Visit Verification Exception ACKNOWLEDGE THIS EXCEPTION

Client Signature Exception ACKNOWLEDGE THIS EXCEPTION

Service Verification Exception ACKNOWLEDGE THIS EXCEPTION

REASON CODE * RESOLUTION CODE REASON NOTE

Select Reason Code Select Resolution Reason Note **SAVE**

Select Reason Code

- 10 Individual Data Issue
- 20 DCW/NAP Error
- 30 Device Issue
- 40 Telephony Issue
- 50 Individual Refused Verification
- 55 Individual Unable to Verify
- 57 Verification Attempt Failed
- 60 Split Visit - Overtime
- 65 Split Visit - Multiple Programs
- 67 Split Visit - Home Care Attendant
- 70 Individual Is Displaced
- 80 Retroactive Eligibility Determination
- 85 Retroactive Payer Change
- 90 Group Visit

CANCEL

Visit Details Visit Start Date: 10/27/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Shaw, Lily	99960	111524398649	LaManna, Fred	

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- MERGE CALLS
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

- Visit Verification Exception ACKNOWLEDGE THIS EXCEPTION

- Client Signature Exception ACKNOWLEDGE THIS EXCEPTION

- Service Verification Exception ACKNOWLEDGE THIS EXCEPTION

REASON CODE *

55 Individual Unat ▾

RESOLUTION CODE *

Select Resolution ▾

- Select Resolution Code
- Written Documentation Maintained

REASON NOTE *

Reason Note

SAVE

CANCEL

Visit Details Visit Start Date: 10/27/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Shaw, Lily	99960	111524398649	LaManna, Fred	

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- MERGE CALLS
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

Visit Verification Exception ACKNOWLEDGE THIS EXCEPTION

Client Signature Exception ACKNOWLEDGE THIS EXCEPTION

Service Verification Exception ACKNOWLEDGE THIS EXCEPTION

REASON CODE * RESOLUTION CODE * REASON NOTE *

55 Individual Unal ▾ Written Documen ▾ Client Sleeping SAVE

CANCEL

Success
Visit is successfully updated.

Visit Details Visit Start Date: 07/18/2019

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Shaw, Lily	99960	111524398649	LaManna, Fred	

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- MERGE CALLS
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

Visit Details Visit Start Date: 10/27/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Shaw, Lily	99960	111524398649	LaManna, Fred	

GENERAL	REASON CODE	ITEM	DATE	CHANGED BY
CLIENT	34 - Individual Not Available (requires free text explanation)	Acknowledge exception: Service Verification Exception	4/13/2018 3:37:53 PM	User19670
EMPLOYEE		Acknowledge exception: Client Signature Exception	4/13/2018 3:37:53 PM	User19670
CALL LOG		Acknowledge exception: Visit Verification Exception	4/13/2018 3:30:02 PM	User19670
EXCEPTIONS	Showing 1 to 3 of 3 entries			
GPS	« < 1 > »			
MEMO				
CLAIMS				
HISTORY				

CANCEL

Shaw, Lily	LaManna, Fred	G0300	10/27/2017	02:20 PM	05:47 PM	03:27	03:27	Verified	<input type="checkbox"/>	
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« < 1 2 3 4 5 > »

Showing 1 to 50 of 223 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
(555)555-1307	Munoz, Rebecca	●	10/27/2017	05:32 PM	●					[...]	Incomplete	<input type="checkbox"/>	
(555)555-3366	Spector, Mark	●	10/27/2017	04:39 PM	●					[...]	Incomplete	<input type="checkbox"/>	
(555)555-8084	Germaine, Justin	●	10/27/2017	03:29 PM	●					[...]	Incomplete	<input type="checkbox"/>	
Morris, Jack	Healy, CLare	G0156	10/27/2017	02:25 PM	●					[...]	Incomplete	<input type="checkbox"/>	
Clark, Richard	Muir, Jane	G0156	10/27/2017	02:21 PM	05:30 PM	03:09				03:09	Incomplete	<input type="checkbox"/>	

Visit Details Visit Start Date: 10/23/2017 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
(555)555-5850				

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- MERGE CALLS
- EXCEPTIONS
- GPS
- MEMO**
- CLAIMS
- HISTORY

MEMO

Enter Memo

1024 characters remaining.

SAVE

UNKNOWN VISIT DETAILS

LAST NAME:
|
FIRST NAME:

MEDICAID ID #:
|
CLIENT ID #:

Visit Details Visit Start Date: 10/23/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
(555)555-2201			Borges, Maritza	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

No Client has been assigned to this visit.

Find Client

LAST NAME FIRST NAME CLIENT ID # 🔍

CLIENT MEDICAID ID INCLUDE INACTIVE CLIENTS

CANCEL

Visit Details Visit Start Date: 10/23/2017 ✕

CLIENT NAME (555)555-2201	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME Borges, Maritza	EMPLOYEE ID #
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GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

No Client has been assigned to this visit.

Find Client

LAST NAME: FIRST NAME: CLIENT ID #: 🔍

CLIENT MEDICAID ID: INCLUDE INACTIVE CLIENTS

Actions	Last Name	First Name	Client ID #	Primary Phone #	Client Medicaid ID
<input type="radio"/>	Smith	John	99920	5555554125	111529749160

Showing 1 to 1 of 1 entries

« < 1 > »

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
(555)555-2201			Borges, Maritza	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

No Client has been assigned to this visit.

Find Client

LAST NAME: FIRST NAME: CLIENT ID #:

CLIENT MEDICAID ID: INCLUDE INACTIVE CLIENTS

Actions	Last Name	First Name	Client ID #	Primary Phone #	Client Medicaid ID
<input checked="" type="radio"/>	Smith	John	99920	5555554125	111529749160

Showing 1 to 1 of 1 entries

« < 1 > »

REASON CODE * RESOLUTION CODE REASON NOTE

CLIENT NAME (555)555-2201	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME Borges, Maritza	EMPLOYEE ID #
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GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

No Client has been assigned to this visit.

Find Client

LAST NAME:

FIRST NAME:

CLIENT ID #:

CLIENT MEDICAID ID:

INCLUDE INACTIVE CLIENTS

Actions	Last Name	First Name	Client ID #	Primary Phone #	Client Medicaid ID
<input checked="" type="radio"/>	Smith	John	99920	5555554125	111529749160

Showing 1 to 1 of 1 entries

« < 1 > »

REASON CODE * RESOLUTION CODE * REASON NOTE

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Smith, John	99920	111529749160	Borges, Maritza	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

Client Contact Information

ADDRESS TYPE	ADDRESS LINE 1	ADDRESS LINE 2	CITY
None	121 Midland Avenue	None	Columbus
STATE	ZIP CODE		
OH	43223-0000		
GENDER	LANGUAGE PREFERENCE	SUPERVISOR	TIME ZONE
None	English	None	US/Eastern

Emergency Contact Information

Find Client

LAST NAME:

FIRST NAME:

CLIENT ID #:

CLIENT MEDICAID ID:

INCLUDE INACTIVE CLIENTS

CANCEL

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
Peterson, Joe (555)555-5850	009900796		10/22/2017	01:58 PM						[...]	Incomplete	<input type="checkbox"/>	

Exceptions:
Unknown Employees

Visit Details

Visit Start Date: 10/22/2017

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Peterson, Joe	99944	111516118832	009900796	

No Employee has been associated with this visit.

Find Employee

LAST NAME	FIRST NAME	EMPLOYEE ID #	DISCIPLINE
<input type="text" value="Last Name"/>	<input type="text" value="First Name"/>	<input type="text" value="Employee ID #"/>	<input type="text" value="Select Discipline"/>

INCLUDE INACTIVE EMPLOYEE

CANCEL

Visit Details Visit Start Date: 10/22/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Peterson, Joe	99944	111516118832	009900796	

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- MERGE CALLS
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

No Employee has been associated with this visit.

Find Employee

LAST NAME	FIRST NAME	EMPLOYEE ID #	DISCIPLINE		
<input type="text" value="Acosta"/>	<input type="text" value="First Name"/>	<input type="text" value="Employee ID #"/>	<input type="text" value="Select Disciplina"/>	<input type="button" value="Q"/>	
<input checked="" type="checkbox"/> INCLUDE INACTIVE EMPLOYEE					
Actions	Last Name	First Name	Employee ID	Santrax ID	Discipline
<input type="radio"/>	Acosta	John		9996724	

Showing 1 to 1 of 1 entries

« < 1 > »

Visit Details Visit Start Date: 10/22/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Peterson, Joe	99944	111516118832	009900796	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

No Employee has been associated with this visit.

Find Employee

LAST NAME: FIRST NAME: EMPLOYEE ID #: DISCIPLINE:

INCLUDE INACTIVE EMPLOYEE

Actions	Last Name	First Name	Employee ID	Santrax ID	Discipline
<input type="radio"/>	Acosta	John		9996724	

Showing 1 to 1 of 1 entries

« < 1 > »

REASON CODE * RESOLUTION CODE * REASON NOTE

Visit Details Visit Start Date: 10/22/2017 ✕

CLIENT NAME Peterson, Joe	CLIENT ID # 99944	MEDICAID ID # 111516118832	EMPLOYEE NAME Acosta, John	EMPLOYEE ID #
-------------------------------------	-----------------------------	--------------------------------------	--------------------------------------	----------------------

GENERAL	SANTRAX ID 9996724	PRIMARY PHONE NUMBER None	DISCIPLINE None	
CLIENT	ADDRESS LINE 1 None	ADDRESS LINE 2 None	CITY None	STATE None
EMPLOYEE	ZIP CODE None	TERMINATION DATE None		
CALL LOG	PROVIDER ID None			

Find Employee

LAST NAME	FIRST NAME	EMPLOYEE ID #	DISCIPLINE	
<input type="text" value="Last Name"/>	<input type="text" value="First Name"/>	<input type="text" value="Employee ID #"/>	<input type="text" value="Select Disciplin"/>	<input type="button" value="Q"/>

INCLUDE INACTIVE EMPLOYEE

FILTER VISITS BY: Exception Types

EXCEPTION TYPES: Visits Without In-Calls, Visits Without

Show advanced filter options

SEARCH CLEAR

EXPORT

Show: 50 per page Show Display Options

Showing 1 to 50 of 60 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
Peterson, Joe	Acosta, John		10/22/2017	01:58 PM						[...]	Incomplete	<input type="checkbox"/>	
(555)555-5850			10/23/2017	07:58 AM						[...]	Incomplete	<input type="checkbox"/>	
(555)555-5232	Torres, Vicky		10/23/2017	08:02 AM						[...]	Incomplete	<input type="checkbox"/>	

Visit Details Visit Start Date: 10/22/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Peterson, Joe	99944	111516118832	Acosta, John	

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG**
- MERGE CALLS
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

CALL IN				CLIENT ID#
CALL DATE	CALL TIME	CALL TYPE	SERVICE	
10/22/2017	01:58 PM	EVV (telephony)	N/A	
USER	ORIGINATING PHONE #	CALL SOURCE		
009900796	(555) 555-1889	SANDATA		

Add Manual Call

CALL DATE * MM/DD/YYYY	CALL TIME * HH:MM AM/PM	SERVICE	TIME ZONE
<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="10:20 AM"/>	<input type="text" value="Select Service"/>	<input type="text" value="US/Eastern"/>
REASON CODE *	RESOLUTION CODE	REASON NOTE	
<input type="text" value="Select Reason Coc"/>	<input type="text" value="Select Resolution"/>	<input type="text" value="Reason Note"/>	<input type="button" value="ADD"/>

Visit Details Visit Start Date: 10/22/2017 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Peterson, Joe	99944	111516118832	Acosta, John	

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG**
- MERGE CALLS
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

CALL IN CLIENT ID#

CALL DATE	CALL TIME	CALL TYPE	SERVICE
10/22/2017	01:58 PM	EVW (telephony)	N/A
USER	ORIGINATING PHONE #	CALL SOURCE	
009900796	(555) 555-1889	SANDATA	

Add Manual Call

CALL DATE * MM/DD/YYYY	CALL TIME * HH:MM AM/PM	SERVICE	TIME ZONE
10/22/2017	10:20 AM	Select Service ▼	US/Eastern ▼

REASON CODE *

REASON NOTE **ADD**

OCTOBER 2017

<< < TODAY > >>

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

CANCEL

Visit Details
Visit Start Date: 10/22/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Peterson, Joe	99944	111516118832	Acosta, John	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

CALL IN				CLIENT ID #
CALL DATE	CALL TIME	CALL TYPE	SERVICE	
10/22/2017	01:58 PM	EVV (telephony)	N/A	
USER	ORIGINATING PHONE #	CALL SOURCE		
009900796	(555) 555-1889	SANDATA		

Add Manual Call

CALL DATE * MM/DD/YYYY

CALL TIME * HH:MM AM/PM

SERVICE

Select Service ▾

Select Service
SPHH Nsg - RN (G0299)
PDN (T1000)
MyCare - HCA (S5125)
RN Assessment (T1001)
SPHH Aide (G0156)
MyCare - LPN (T1003)
HPC
Passport HCA Personal Care (S5125)
MyCare - RN (T1002)
SPHH Nsg - LPN (G0300)
IO NSG - RN (T1002)
Passport - PCA (T1019)
OHCW PCA (T1019)
MyCare - PCA (T1019)
OHCW HCA (S5125)
Passport HCA (S5125)
IO NSG - LPN (T1003)
Passport - LPN (T1003)
OHCW Nsg - RN (T1002)

TIME ZONE

Visit Details Visit Start Date: 10/22/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Peterson, Joe	99944	111516118832	Acosta, John	

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- MERGE CALLS
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

CALL IN				CLIENT ID#
CALL DATE	CALL TIME	CALL TYPE	SERVICE	
10/22/2017	01:58 PM	EVV (telephony)	N/A	
USER	ORIGINATING PHONE #	CALL SOURCE		
009900796	(555) 555-1889	SANDATA		

Add Manual Call

CALL DATE * MM/DD/YYYY	CALL TIME * HH:MM AM/PM	SERVICE	TIME ZONE
10/22/2017	10:20 AM	MyCare - HCA (S51 ▾)	US/Eastern ▾
REASON CODE *	RESOLUTION CODE *	REASON NOTE	ADD
20 DCW/NAP Error ▾	Written Document ▾	Reason Note	

CANCEL

Visit Details Visit Start Date: 10/22/2017 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Peterson, Joe	99944	111516118832	Acosta, John	

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG**
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

CALL IN				CLIENT ID#
CALL DATE	CALL TIME	CALL TYPE	SERVICE	
10/22/2017	01:58 PM	EVV (telephony)	N/A	
USER	ORIGINATING PHONE #		CALL SOURCE	
009900796	(555) 555-1889		SANDATA	

CALL OUT				CLIENT ID# 000099944
CALL DATE	CALL TIME	CALL TYPE	SERVICE	
10/22/2017	04:02 PM	Manual Call	(55125)	
USER	CALL SOURCE		SANDATA	

CANCEL

Adjusting Visits

Visit Details Visit Start Date: 07/18/2019 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Jenkins, Peter	234658	144848787875	Smith, Jane	

- GENERAL**
- CLIENT
- EMPLOYEE
- CALL LOG
- MERGE CALLS
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
07/18/2019	07/18/2019	US/Eastern	Verified
CALL IN	CALL OUT	CALL HOURS	UNITS
02:05 PM	10:30 PM	08:25	34
ADJUSTED IN DATE	ADJUSTED IN HH-MM AM/PM	ADJUSTED OUT DATE	ADJUSTED OUT HH-MM AM/PM
07/18/2019	02:05 PM	07/18/2019	10:30 PM
AGENCY ID	AGENCY NAME	BILL HOURS	
25090	Test p1 to p2 Agency	08:25	
PAYER	PROGRAM	SERVICE	GROUP VISIT CODE
ODA	PP	Passport HCA (SE)	
CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	
No	Yes	Yes	
VISIT SOURCE	GENERATE GROUP VISIT CODE		
SANDATA			
<input type="checkbox"/> DO NOT BILL	<input checked="" type="checkbox"/> APPROVED		

CANCEL

Visit Details Visit Start Date: 07/18/2019 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Jenkins, Peter	234658	144848787875	Smith, Jane	

- GENERAL**
- CLIENT
- EMPLOYEE
- CALL LOG
- MERGE CALLS
- EXCEPTIONS
- GPS
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- CLAIMS
- HISTORY

VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
07/18/2019	07/18/2019	US/Eastern	Verified
CALL IN	CALL OUT	CALL HOURS	UNITS
02:05 PM	10:30 PM	08:25	34
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07/18/2019	02:05 PM	07/18/2019	08:30 PM
AGENCY ID	AGENCY NAME	BILL HOURS	
25090	Test p1 to p2 Agency	08:25	
PAYER	PROGRAM	SERVICE	
ODA	PP	Passport HCA (S	
CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	
No	Yes	Yes	
VISIT SOURCE	GENERATE GROUP VISIT CODE		
SANDATA			
<input type="checkbox"/> DO NOT BILL	<input checked="" type="checkbox"/> APPROVED		
REASON CODE *	RESOLUTION CODE	REASON NOTE	SAVE
Select Reason Code	Select Resolution C	Reason Note	

CANCEL

Visit Details Visit Start Date: 07/18/2019 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Jenkins, Peter	234658	144848787875	Smith, Jane	

GENERAL

VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
07/18/2019	07/18/2019	US/Eastern	Verified
CALL IN	CALL OUT	CALL HOURS	UNITS
02:05 PM	10:30 PM	08:25	34
ADJUSTED IN DATE	ADJUSTED IN HH:MM AM/PM	ADJUSTED OUT DATE	ADJUSTED OUT HH:MM AM/PM
07/18/2019	02:05 PM	07/18/2019	04:30 PM
AGENCY ID	AGENCY NAME	BILL HOURS	
25090	Test p1 to p2 Agency	08:25	
PAYER	PROGRAM	SERVICE	GROUP VISIT CODE
ODA	PP	Passport HCA (SE	
CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	
No	Yes	Yes	
VISIT SOURCE	GENERATE GROUP VISIT CODE		
SANDATA			
<input type="checkbox"/> DO NOT BILL	<input type="checkbox"/> APPROVED		
REASON CODE *	RESOLUTION CODE	REASON NOTE	SAVE
Select Reason Code	Select Resolution C	Reason Note	

REASON CODE *

- Select Reason Code
- 10 Individual Data Issue
- 20 DCW/NAP Error
- 30 Device Issue
- 40 Telephony Issue
- 50 Individual Refused Verification
- 55 Individual Unable to Verify
- 57 Verification Attempt Failed
- 60 Split Visit - Overtime
- 65 Split Visit - Multiple Programs
- 67 Split Visit - Home Care Attendant
- 70 Individual Is Displaced
- 80 Retroactive Eligibility Determination
- 85 Retroactive Payer Change
- 90 Group Visit

CANCEL

Visit Details Visit Start Date: 07/18/2019 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Jenkins, Peter	234658	144848787875	Smith, Jane	

- GENERAL**
- CLIENT
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- CLAIMS
- HISTORY

VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
07/18/2019	07/18/2019	US/Eastern	Verified
CALL IN	CALL OUT	CALL HOURS	UNITS
02:05 PM	10:30 PM	08:25	34
ADJUSTED IN DATE	ADJUSTED IN HH:MM AM/PM	ADJUSTED OUT DATE	ADJUSTED OUT HH:MM AM/PM
07/18/2019	02:05 PM	07/18/2019	04:30 PM
AGENCY ID	AGENCY NAME	BILL HOURS	
25090	Test p1 to p2 Agency	08:25	
PAYER	PROGRAM	SERVICE	GROUP VISIT CODE
ODA	PP	Passport HCA (S5	
CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	
No	Yes	Yes	
VISIT SOURCE	GENERATE GROUP VISIT CODE		
SANDATA			
<input type="checkbox"/> DO NOT BILL	<input checked="" type="checkbox"/> APPROVED		
REASON CODE *	RESOLUTION CODE *	REASON NOTE	SAVE
20 DCW/NAP Error	Written Documentz	Reason Note	

CANCEL

Visit Details Visit Start Date: 07/18/2019 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Jenkins, Peter	234658	144848787875	Smith, Jane	

GENERAL | CLIENT | EMPLOYEE | CALL LOG | EXCEPTIONS | GPS | MEMO | CLAIMS | HISTORY

VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
07/18/2019	07/18/2019	US/Eastern	Verified
CALL IN	CALL OUT	CALL HOURS	UNITS
02:05 PM	10:30 PM	08:25	10
ADJUSTED IN DATE	ADJUSTED IN HH:MM AM/PM	ADJUSTED OUT DATE	ADJUSTED OUT HH:MM AM/PM
07/18/2019	02:05 PM	07/18/2019	04:30 PM
AGENCY ID	AGENCY NAME	BILL HOURS	
25090	Test p1 to p2 Agency	02:25	
PAYER	PROGRAM	SERVICE	GROUP VISIT CODE
ODA	PP	Passport HCA (S5)	
CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	
No	Yes	Yes	
VISIT SOURCE	GENERATE GROUP VISIT CODE		
SANDATA			
<input type="checkbox"/> DO NOT BILL	<input checked="" type="checkbox"/> APPROVED		

CANCEL

Visit Details Visit Start Date: 07/18/2019 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Jenkins, Peter	234658	1448487875	Smith, Jane	

- GENERAL**
- CLIENT
- EMPLOYEE
- CALL LOG
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
07/18/2019	07/18/2019	US/Eastern	Verified
CALL IN	CALL OUT	CALL HOURS	UNITS
02:05 PM	10:30 PM	08:25	10
ADJUSTED IN DATE	ADJUSTED IN HH-MM AM/PM	ADJUSTED OUT DATE	ADJUSTED OUT HH-MM AM/PM
07/18/2019	02:05 PM	07/18/2019	04:30 PM
AGENCY ID	AGENCY NAME	BILL HOURS	
25090	Test p1 to p2 Agency	02:25	
PAYER	PROGRAM	SERVICE	GROUP VISIT CODE
ODA	PP	Passport HCA (S5125)	
CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	<div style="border: 2px solid red; padding: 5px;"><ul style="list-style-type: none">Select ServiceSPHH Nsg - RN (G0299)PDN (T1000)MyCare - HCA (S5125)RN Assessment (T1001)SPHH Aide (G0156)MyCare - LPN (T1003)HPCPassport HCA Personal Care (S5125)MyCare - RN (T1002)SPHH Nsg - LPN (G0300)IO NSG - RN (T1002)Passport - PCA (T1019)OHCW PCA (T1019)MyCare - PCA (T1019)OHCW HCA (S5125)Passport HCA (S5125)IO NSG - LPN (T1003)Passport - LPN (T1003)OHCW Nsg - RN (T1002)</div>	
No	Yes		
VISIT SOURCE	GENERATE GROUP VISIT CODE		
SANDATA			
<input type="checkbox"/> DO NOT BILL	<input type="checkbox"/> APPROVED		

CANCEL

	07/18/2019	12:32 PM		
A (S5125)	07/09/2019	01:00 PM	02:26 PM	01:26

Visit Details Visit Start Date: 07/18/2019 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Jenkins, Peter	234658	144848787875	Smith, Jane	

- GENERAL**
- CLIENT
- EMPLOYEE
- CALL LOG
- EXCEPTIONS
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VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
07/18/2019	07/18/2019	US/Eastern	Verified
CALL IN	CALL OUT	CALL HOURS	UNITS
02:05 PM	10:30 PM	08:25	10
ADJUSTED IN DATE	ADJUSTED IN HH:MM AM/PM	ADJUSTED OUT DATE	ADJUSTED OUT HH:MM AM/PM
07/18/2019	02:05 PM	07/18/2019	04:30 PM
AGENCY ID	AGENCY NAME	BILL HOURS	
25090	Test p1 to p2 Agency	02:25	
PAYER	PROGRAM	SERVICE	GROUP VISIT CODE
Select Payer	MyC	MyCare - LPN (T1)	
CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	
No	Yes	Yes	
VISIT SOURCE	GENERATE GROUP VISIT CODE		
SANDATA			
<input type="checkbox"/> DO NOT BILL	<input checked="" type="checkbox"/> APPROVED		
REASON CODE *	RESOLUTION CODE *	REASON NOTE	SAVE
20 DCW/NAP Error	Written Document	Reason Note	

CANCEL

Visit Details Visit Start Date: 07/18/2019 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Jenkins, Peter	234658	144848787875	Smith, Jane	

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VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
07/18/2019	07/18/2019	US/Eastern	Verified
CALL IN	CALL OUT	CALL HOURS	UNITS
02:05 PM	10:30 PM	08:25	10
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07/18/2019	02:05 PM	07/18/2019	04:30 PM
AGENCY ID	AGENCY NAME	BILL HOURS	
25090	Test p1 to p2 Agency	02:25	
Required Select Payer	PROGRAM MyC	SERVICE MyCare - LPN (T1)	GROUP VISIT CODE
Buckeye	CLIENT VERIFIED SERVICE Yes	CLIENT SIGNATURE Yes	
Molina	GENERATE GROUP VISIT CODE		
Aetna	<input type="checkbox"/> DO NOT BILL	<input checked="" type="checkbox"/> APPROVED	
UHC	REASON CODE * 20 DCW/NAP Error	RESOLUTION CODE * Written Documentz	REASON NOTE Reason Note
CareSource			SAVE
SANDATA			

CANCEL

Success
Visit is successfully updated.

Visit Details Visit Start Date: 07/18/2019 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Jenkins, Peter	234658	1448487875	Smith, Jane	

- GENERAL**
- CLIENT
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- CLAIMS
- HISTORY

VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
07/18/2019	07/18/2019	US/Eastern	Incomplete
CALL IN	CALL OUT	CALL HOURS	UNITS
02:05 PM	10:30 PM	08:25	10
ADJUSTED IN DATE	ADJUSTED IN HH:MM AM/PM	ADJUSTED OUT DATE	ADJUSTED OUT HH:MM AM/PM
07/18/2019 📅	02:05 PM	07/18/2019 📅	04:30 PM
AGENCY ID	AGENCY NAME	BILL HOURS	
25090	Test p1 to p2 Agency	02:25	
PAYER	PROGRAM	SERVICE	GROUP VISIT CODE
CareSource ▼	MyC ▼	MyCare - LPN (T1) ▼	
CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	
No	Yes	Yes ▶	
VISIT SOURCE	GENERATE GROUP VISIT CODE		
SANDATA			
<input type="checkbox"/> DO NOT BILL	<input checked="" type="checkbox"/> APPROVED		

CANCEL

Visit Details Visit Start Date: 07/18/2019 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Jenkins, Peter	234658	144848787875	Smith, Jane	

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VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
07/18/2019	07/18/2019	US/Eastern	Incomplete
CALL IN	CALL OUT	CALL HOURS	UNITS
02:05 PM	10:30 PM	08:25	10
ADJUSTED IN DATE	ADJUSTED IN HH:MM AM/PM	ADJUSTED OUT DATE	ADJUSTED OUT HH:MM AM/PM
07/18/2019	02:05 PM	07/18/2019	04:30 PM
AGENCY ID	AGENCY NAME	BILL HOURS	
25090	Test p1 to p2 Agency	02:25	
PAYER	PROGRAM	SERVICE	GROUP VISIT CODE
CareSource	MyC	MyCare - LPN (T1	<input type="text"/>
CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	
No	Yes	Yes	
VISIT SOURCE	GENERATE GROUP VISIT CODE		
SANDATA			
<input type="checkbox"/> DO NOT BILL	<input checked="" type="checkbox"/> APPROVED		

CANCEL

Remember to refer to your training manual!

<https://medicaid.ohio.gov/INITIATIVES/Electronic-Visit-Verification/Training>

Ohio Department of Medicaid

Select Language Text Size: +A -A
Powered by Google Translate

HOME MEDICAID 101 ▾ FOR OHIOANS ▾ PROVIDERS ▾ MANAGED CARE ▾ INITIATIVES ▾ RESOURCES ▾ CAREERS CONTACT

- Individual Quick Reference Guide
- EVV Individual Webinar

EVV Provider Training

- Agency
 - Agency Training Registration Quick Reference Guide
 - Agency Training Registration
 - **Agency Training Manual**
 - Translated Agency Training Manual
- Non-Agency
 - Non-Agency Training Registration Quick Reference Guide
 - Non-Agency Training Registration
 - **Non-Agency Training Manual**
 - Translated Non-Agency Training Manual

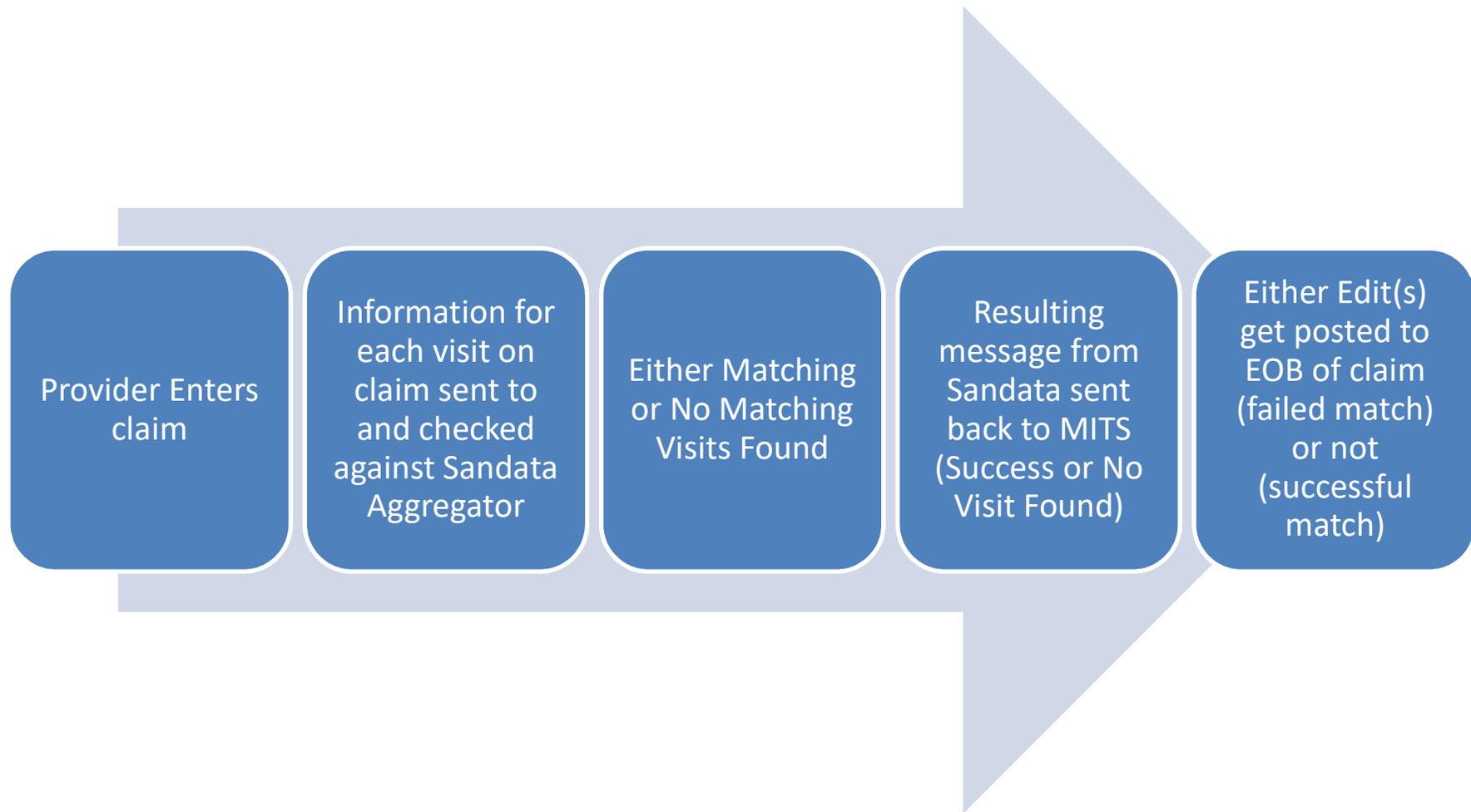
EVV Provider Hotline: (855) 805-3505

How does claims matching work?

What is claims matching?

- **Claims matching** is where information in another system (in this case EVV) must match information on a claim that is submitted
- If a claim does not match the information in the EVV system, providers will see an edit on their **Explanation of Benefits (EOB)** for each Detail Line on the claim that does not have a matching visit in EVV
- An **edit** is a message that shows up on the EOB from MITS to providers; it indicates that there is something the provider should be aware of with their claim and possibly take action on

EVV Claims Matching Process:



What criteria is used to match claims and EVV visits?

- MITS will send the following information to Sandata EVV Aggregator to locate a visit:
 - » Internal Control Number (ICN)
 - » Detail Line Number (DLN)
 - » **Provider Medicaid ID**
 - » **Client Medicaid ID**
 - » **Procedure code**
 - » **Start Date of Service**
 - » **Units**
 - **Units EVV must be greater than or equal to units billed in MITS**
- Only elements used to match visits in Sandata EVV**

Additional Claims Matching Rules

- In order for a visit to be available for matching in Sandata EVV, it must be in a *Verified* status
- Since T1001 - RN Assessment is billed per visit, units will not be used in the matching. A visit in EVV for service code T1001 will be a match to an RN Assessment visit on a claim, as long as the service occurs on the same calendar day
- Modifiers do not impact the claims matching process

What if a visit match failed?

Messages regarding failed matching could be seen in multiple places:

- **EOB will show 3611 edit: ELECTRONIC VISIT VERIFICATION (EVV) NOT VERIFIED BY Sandata** – This edit can be seen in the EOB section of a claim in the MITS portal (even if the claim was submitted through an EDI) and on the Remittance Advice (RA)
- If you have questions on how to locate and read your RA, please visit ODM's EVV webpage, here:
<https://medicaid.ohio.gov/Portals/0/Initiatives/EVV/Providers/Remittance-Advice.pdf>

If you are a provider, you can see the edits when you pull up your claim in MITS under the ICN number. They would appear in the last panel of the MITS claim form, on the line under *EOB Information*.

EOB Information							
Detail Number	Error Disposition	EOB Code	EOB Description	CARC	CARC Amount	CARC Description	RARC RARC Description

Example of a 3611 in an EOB

Item	FDOS	Units	Charges	Medicaid Allowed Amount	Status	Place of Service	Procedure Code	Modifier 1	Modifier 2	Modifier 3	Modifier 4	Final EAPG
2	10/11/2018	4.00	\$11.44	\$11.44	PAID	12	SS125		U8			
1	10/09/2018	4.00	\$11.44	\$11.44	PAID	12	SS125		U8			

Select row above to update -or- click add an item button below.

Item: 2

From DOS: 10/11/2018

To DOS: 10/11/2018

Units: 4.00

Charges: \$11.44

Medicaid Allowed Amount: \$11.44

Rendering Provider: [REDACTED]

Submitted EAPG: []

Initial EAPG: []

Status: PAID

Visit Start Time: [] [] []

Visit End Time: [] [] []

Service Duration less than 90 days:

Place Of Service: 12

Procedure Code: SS125

Emergency: []

Referred EPSDT Service/Family Planning: []

Diagnosis Code Pointer: [] [] [] []

Modifiers: UB [] []

Final EAPG: []

Pay Action: []

NDC Detail - Other Payer Claim/Check Additional Provider Information

Claim Status Information	
Claim Status	PAID
Claim ICN	[REDACTED]
Paid Date	10/25/2018
Paid Amount	\$22.88

EOB Information							
Detail Number	Error Disposition	EOB Code	EOB Description	CARC	CARC Amount	CARC Description	RARC: RARC Description
1	PAID	3611	ELECTRONIC VISIT VERIFICATION (EVV) NOT VERIFIED BY VENDOR	272	\$0.00	Coverage/program guidelines were not met.	
1	SUPERSUSPEND	9008	PENDING VISIT VERIFICATION	133	\$0.00	The disposition of this service line is pending further review. (Use only with Group Code DA). Usage: Use of this code requires a reversal and correction when the service line is finalized (use only in Loop 2110 CAS segment of the 835 or Loop 2430 of the 837).	M16 Alert: Please see our web site, mailings, or bulletins for more details concerning this policy/procedure/decision.

What if a visit match failed? (Continued)

Providers who use an EDI to submit claims would not see the 3611 edit. Instead...

- Providers who use an EDI reconcile their claims and payments using the 835 Electronic Remittance Advice (ERA) from their trading partner or clearinghouse
- Will see a **Claim Adjustment Reason Code (CARC) of 272, Coverage/program guidelines were not met.**
- This means the same thing as the 3611 code on an RA; there's something in your EVV data that needs your attention

What if a visit match was *found*?

- If a visit in the EVV system was successfully found and matched with a detail line on a claim...
 - » You will not see any EVV-related code or edit for the detail line
 - » The status of the visit in EVV will change from *Verified* to *Processed*
 - » The matching claim's information will show in the **Claims** tab of the visit

BATCH ID	TRANSACTION ID	DATE RETURNED FOR CLAIMS PROCESSING	INTERNAL CONTROL NUMBER	DETAIL LINE NUMBER	MODIFIER	BILLEE UNITS
		12/12/2018 ...		05		32
		12/12/2018 ...		05		32
		12/12/2018 ...		05		32

Showing 1 to 3 of 3 entries

« < 1 > »

Things to check if you receive an EVV edit or code:

- ✓ Do you have a visit in EVV for the visit you submitted on the claim?
- ✓ Are there outstanding exceptions on the visit in EVV? (In other words, is the visit in an *Incomplete* status in EVV?)
- ✓ Does the Medicaid ID entered in the EVV system for the individual to whom you provide care match what's on the claim?
- ✓ Does the date of service on your claim match the date on the visit?
- ✓ Does the service you billed for match the service on the visit?
- ✓ Are the units you are billing for less than or equal to what the visit shows in EVV?

Talking Points for Individuals

Key things to know when talking with individuals...

- Using the Sandata Mobile Connect (SMC) application on a device is the preferred method for logging visits. With this:
 - » There is no tracking of the individual; only the location of the start and end of the visit is documented
 - » The camera is disabled and cannot take photographs or video
 - » There is no audio recording enabled except for when the individual themselves tap “Record” when capturing voice verification of a visit
 - » There is no biometric verification used or able to be used on the device
 - » The device needs to be kept charged and available for caregivers

Key things to know when talking with individuals...

- If an individual is unwilling or unable to use the application, review the option of using telephony with them
 - » Any phone can be used to log visits over telephony
- For all services except DODD services, ensure individual understands their role in the EVV process, which is to provide visit verification by voice or signature
- There is a video on ODM's website that was created for the public which may help explain EVV

Questions ?
