

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



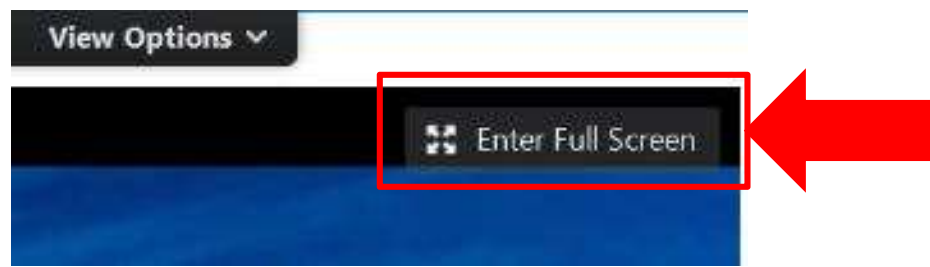
Webinar Questions

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.

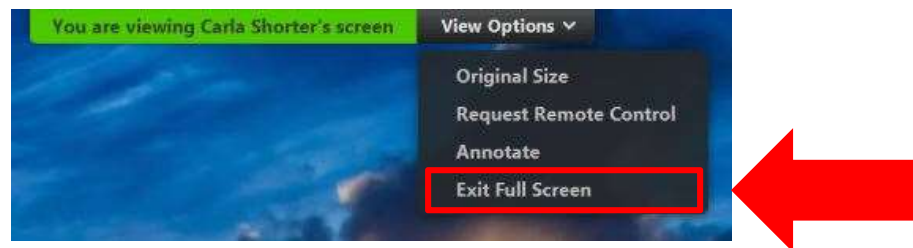
Your instructor and the EVV team will answer as many questions as possible during the time allotted, at the end of the webinar.

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

Q Navigate Modules

Dashboard

Visit Maintenance

Reports & Exports

Data Entry

Security

Online Manual

Visit Maintenance / Manage Visits

Account: 9670 - user19670 LOG OUT

Select a Visit

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

CREATE CALL

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

Q Navigate Modules

Dashboard

Visit Maintenance

Reports & Exports

Data Entry

Security

Online Manual

Visit Maintenance Visit Maintenance / Manage Visits

Account: 9670 - user19670 LOG OUT

Select a Visit

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

Q 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

Q SEARCH CLEAR
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
<div> <div> 1 2 3 4 5 </div> </div>									

FILTER VISITS BY

All Visits

Show advanced filter options ▾

Q SEARCH

CLEAR

EXPORT ▾

Show: 50 per page

Show Display Options ▾

« < 1 2 3 4 5 > »

Showing 1 to 50 of 223 entries

Sort by Visit Status, Sorted Descending													
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 ID

FILTER VISITS BY

All Visits ▼

Show advanced filter options ▼

Q SEARCH

CLEAR

EXPORT ▼

Show: 50 ▼ per page | Show Display Options ▼

«

<

1

>

»

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

Enter Client

EMPLOYEE

Enter Employee

CATEGORY

Select Category

PAYER

Select Payer

VISIT STATUS

Verified

CLIENT MEDICAID ID

Enter Client Medicaid ID

FILTER VISITS BY

All Exceptions

Show advanced filter options

Q SEARCH

CLEAR

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

Show advanced filter options

Q SEARCH CLEAR

EXPORT

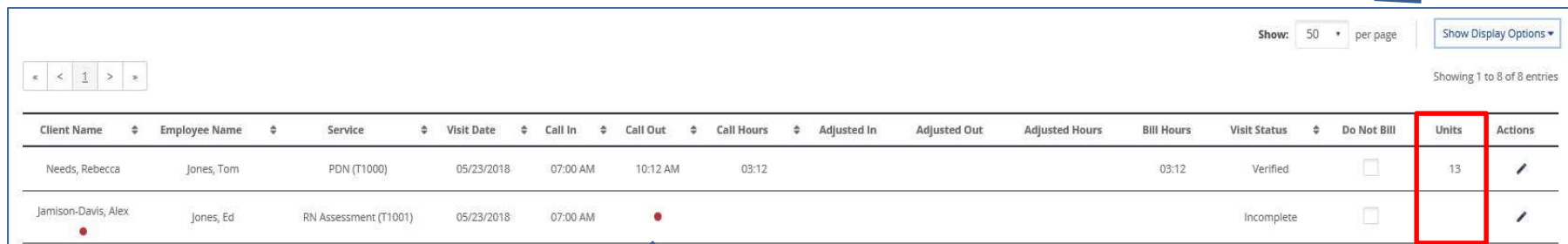
Show: 50 per page Show Display Options

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!



The screenshot shows a table with columns: 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, and Actions. The 'Units' column is highlighted with a red box. A blue arrow points to the 'Show Display Options' button in the top right corner of the table interface.

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 **X**

<input type="checkbox"/> Client ID	<input type="checkbox"/> Client Medicaid ID	<input type="checkbox"/> Client Primary Phone Number
<input checked="" type="checkbox"/> Client Name	<input checked="" type="checkbox"/> Employee Name	<input type="checkbox"/> Employee ID
<input type="checkbox"/> Santrax ID	<input type="checkbox"/> Employee Contact Phone Number	<input type="checkbox"/> Payer
<input type="checkbox"/> Program	<input checked="" type="checkbox"/> Service	<input type="checkbox"/> Agency
<input type="checkbox"/> Supervisor	<input checked="" type="checkbox"/> Visit Date	<input checked="" type="checkbox"/> Scheduled Time In
<input checked="" type="checkbox"/> Scheduled Time Out	<input checked="" type="checkbox"/> Scheduled Hrs	<input checked="" type="checkbox"/> Call In
<input checked="" type="checkbox"/> Call Out	<input checked="" type="checkbox"/> Call Hours	<input checked="" type="checkbox"/> Adjusted Hours
<input type="checkbox"/> Pay Hours	<input checked="" type="checkbox"/> Bill Hours	<input type="checkbox"/> Tasks
<input checked="" type="checkbox"/> Visit Status	<input type="checkbox"/> Memo	<input type="checkbox"/> Client Verified
<input type="checkbox"/> Claims Verification Status	<input checked="" type="checkbox"/> Do Not Bill	<input checked="" type="checkbox"/> Units
<input type="checkbox"/> Group Visit Code		

Step 2

How to see column with Units information:

Sandata EVV

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
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

Show advanced filter options

Q SEARCH CLEAR

EXPORT

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

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

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

CALL IN		CLIENT ID #	
CALL DATE	CALL TIME	CALL TYPE	SERVICE
10/27/2017	02:20 PM	EVV (telephony)	N/A
USER	ORIGINATING PHONE #		CALL SOURCE
009914585	(555) 555-2073		SANDATA
CALL OUT		CLIENT ID #	
CALL DATE	CALL TIME	CALL TYPE	SERVICE
10/27/2017	05:47 PM	EVV (telephony)	G0300
USER	ORIGINATING PHONE #		CALL SOURCE
009914585	(555) 555-2073		SANDATA

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

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 *
Select Reason Code ▼

RESOLUTION CODE
Select Resolution ▼

REASON NOTE
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

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

Select Resolution

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 *
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 *
55 Individual Unal ▾



RESOLUTION CODE *
Written Document ▾


REASON NOTE *

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
CLIENT
EMPLOYEE
CALL LOG
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY

REASON CODE	ITEM	DATE	CHANGED BY
34 - Individual Not Available (requires free text explanation)	Acknowledge exception: Service Verification Exception	4/13/2018 3:37:53 PM	User19670
34 - Individual Not Available (requires free text explanation)	Acknowledge exception: Client Signature Exception	4/13/2018 3:37:53 PM	User19670
34 - Individual Not Available (requires free text explanation)	Acknowledge exception: Visit Verification Exception	4/13/2018 3:30:02 PM	User19670

Showing 1 to 3 of 3 entries

«
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1
>
»

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

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 #

Enter Last Name

Enter First Name

Enter Client ID #

Q

CLIENT MEDICAID ID

☐ INCLUDE INACTIVE CLIENTS

Enter Client Medicaid ID

CANCEL

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 #

Q

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

«

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1

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»

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 #

Smith

Enter First Name

Enter Client ID #

Q

CLIENT MEDICAID ID

☒ INCLUDE INACTIVE CLIENTS

Enter Client Medicaid ID

Actions	Last Name	First Name	Client ID #	Primary Phone #	Client Medicaid ID
	Smith	John	99920	5555554125	111529749160

Showing 1 to 1 of 1 entries

«

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»

REASON CODE *

RESOLUTION CODE

REASON NOTE

SAVE

Select Reason Code

Select Resolution

Reason Note

CANCEL

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 #

Smith

Enter First Name

Enter Client ID #

Q

CLIENT MEDICAID ID

INCLUDE INACTIVE CLIENTS

Enter Client Medicaid ID

☒ INCLUDE INACTIVE CLIENTS

Actions	Last Name	First Name	Client ID #	Primary Phone #	Client Medicaid ID
	Smith	John	99920	5555554125	111529749160

Showing 1 to 1 of 1 entries

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»

REASON CODE *

RESOLUTION CODE *

REASON NOTE

SAVE

11 Phone Number

Written Document

Reason Note

CANCEL

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

Emergency Contact Information

Find Client

LAST NAME

FIRST NAME

CLIENT ID #

CLIENT MEDICAID ID

☒ INCLUDE INACTIVE CLIENTS

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 <div>Exceptions: Unknown Employees</div>		10/22/2017	01:58 PM						[...]	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	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

Last Name

First Name

Employee ID #

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

Acosta

First Name

Employee ID #

Select Discipline ▾

Q

☒ 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

>

»

CANCEL

Visit Details

Visit Start Date: 10/22/2017

CLIENT NAME

Peterson, Joe

CLIENT ID #

99944

MEDICAID ID #

111516118832

EMPLOYEE NAME

009900796

EMPLOYEE ID #

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

No Employee has been associated with this visit.

Find Employee

LAST NAME

Acosta

FIRST NAME

First Name

EMPLOYEE ID #

Employee ID #

DISCIPLINE

Select Discipline

☒ INCLUDE INACTIVE EMPLOYEE

Actions

Last Name

First Name

Employee ID

Santrax ID

Discipline

☒

Acosta

John

9996724

Showing 1 to 1 of 1 entries

«

<

1

>

»

REASON CODE *

16 DCW/NAP Tele

RESOLUTION CODE *

Written Document

REASON NOTE

Reason Note

SAVE

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

SANTRAX ID	PRIMARY PHONE NUMBER	DISCIPLINE	
9996724	None	None	
ADDRESS LINE 1	ADDRESS LINE 2	CITY	STATE
None	None	None	None
ZIP CODE	TERMINATION DATE		
None	None		
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 Discipline"/>

☒ INCLUDE INACTIVE EMPLOYEE

CANCEL

FILTER VISITS BY

EXCEPTION TYPES

Exception Types

Visits Without In-Calls, Visits Without

Show advanced filter options

Q SEARCH

CLEAR

EXPORT

Show: 50 per page

Show Display Options

« < 1 2 > »

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

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

MM/DD/YYYY

CALL TIME * HH:MM AM/PM

10:20 AM

SERVICE

Select Service

TIME ZONE

US/Eastern

REASON CODE *

Select Reason Code

RESOLUTION CODE

Select Resolution

REASON NOTE

Reason Note

ADD

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

TIME ZONE

10/22/2017

10:20 AM

Select Service

US/Eastern

REASON CODE *

REASON NOTE

Select Reason Code

Reason Note

ADD

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	TIME ZONE
10/22/2017	10:20 AM	Select Service	US/Eastern

REASON CODE *	RESOLUTION CODE
Select Reason Coc	Select Resolution

CANCEL

ADD

19

12:32 PM

19

01:00 PM

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)

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

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

CALL IN

CLIENT ID#

CALL DATE

10/22/2017

CALL TIME

01:58 PM

CALL TYPE

EVV (telephony)

SERVICE

N/A

USER

009900796

ORIGINATING PHONE #

(555) 555-1889

CALL SOURCE

SANDATA

Add Manual Call

CALL DATE * MM/DD/YYYY

10/22/2017

CALL TIME * HH:MM AM/PM

10:20 AM

SERVICE

MyCare - HCA (\$51

TIME ZONE

US/Eastern

REASON CODE *

20 DCW/NAP Error

RESOLUTION CODE *

Written Document

REASON NOTE

Reason Note

ADD

CANCEL



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

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

CALL IN

CLIENT ID#

CALL DATE

10/22/2017

CALL TIME

01:58 PM

CALL TYPE

EVV (telephony)

SERVICE

N/A

USER

009900796

ORIGINATING PHONE #

(555) 555-1889

CALL SOURCE

SANDATA

CALL OUT

CLIENT ID# 0000099944

CALL DATE

10/22/2017

CALL TIME

04:02 PM

CALL TYPE

Manual Call

SERVICE

(55125)

USER

CALL SOURCE

SANDATA

CANCEL

Adjusting Visits

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
MERGE CALLS
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY

VISIT START DATE
07/18/2019

VISIT END DATE
07/18/2019

VISIT TIME ZONE
US/Eastern

VISIT STATUS
Verified

CALL IN
02:05 PM

CALL OUT
10:30 PM

CALL HOURS
08:25

UNITS
34

ADJUSTED IN DATE
07/18/2019

ADJUSTED IN HH-MM AM/PM
02:05 PM

ADJUSTED OUT DATE
07/18/2019

ADJUSTED OUT HH-MM AM/PM
10:30 PM

AGENCY ID
25090

AGENCY NAME
Test p1 to p2 Agency

BILL HOURS
08:25

PAYER
ODA

PROGRAM
PP

SERVICE
Passport HCA (SE

GROUP VISIT CODE

CLIENT VERIFIED TIME
No

CLIENT VERIFIED SERVICE
Yes

CLIENT SIGNATURE
Yes

VISIT SOURCE
SANDATA

GENERATE GROUP VISIT CODE

☐ DO NOT BILL

☐ 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	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

VISIT START DATE

07/18/2019

VISIT END DATE

07/18/2019

VISIT TIME ZONE

US/Eastern

VISIT STATUS

Verified

CALL IN

02:05 PM

CALL OUT

10:30 PM

CALL HOURS

08:25

UNITS

34

ADJUSTED IN DATE

07/18/2019

ADJUSTED IN HH-MM AM/PM

02:05 PM

ADJUSTED OUT DATE

07/18/2019

ADJUSTED OUT HH-MM AM/PM

08:30 PM

AGENCY ID

25090

AGENCY NAME

Test p1 to p2 Agency

BILL HOURS

08:25

PAYER

ODA

PROGRAM

PP

SERVICE

Passport HCA (\$5

CLIENT VERIFIED TIME

No

CLIENT VERIFIED SERVICE

Yes

CLIENT SIGNATURE

Yes

VISIT SOURCE

SANDATA

GENERATE GROUP VISIT CODE

DO NOT BILL

APPROVED

REASON CODE *

Select Reason Code

RESOLUTION CODE

Select Resolution C

REASON NOTE

Reason Note

SAVE

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

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

VISIT START DATE

07/18/2019

VISIT END DATE

07/18/2019

VISIT TIME ZONE

US/Eastern

VISIT STATUS

Verified

CALL IN

02:05 PM

CALL OUT

10:30 PM

CALL HOURS

08:25

UNITS

34

ADJUSTED IN DATE

07/18/2019

ADJUSTED IN HH:MM AM/PM

02:05 PM

ADJUSTED OUT DATE

07/18/2019

ADJUSTED OUT HH:MM AM/PM

04:30 PM

AGENCY ID

25090

AGENCY NAME

Test p1 to p2 Agency

BILL HOURS

08:25

PAYER

ODA

PROGRAM

PP

SERVICE

Passport HCA (SE

GROUP VISIT CODE

CLIENT VERIFIED TIME

No

CLIENT VERIFIED SERVICE

Yes

CLIENT SIGNATURE

Yes

VISIT SOURCE

SANDATA

GENERATE GROUP VISIT CODE

DO NOT BILL

APPROVED

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

RESOLUTION CODE

Select Resolution C

REASON NOTE

Reason Note

SAVE

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

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

VISIT START DATE

07/18/2019

VISIT END DATE

07/18/2019

VISIT TIME ZONE

US/Eastern

VISIT STATUS

Verified

CALL IN

02:05 PM

CALL OUT

10:30 PM

CALL HOURS

08:25

UNITS

34

ADJUSTED IN DATE

07/18/2019

ADJUSTED IN HH:MM AM/PM

02:05 PM

ADJUSTED OUT DATE

07/18/2019

ADJUSTED OUT HH:MM AM/PM

04:30 PM

AGENCY ID

25090

AGENCY NAME

Test p1 to p2 Agency

BILL HOURS

08:25

PAYER

ODA

PROGRAM

PP

SERVICE

Passport HCA (SE

GROUP VISIT CODE

CLIENT VERIFIED TIME

No

CLIENT VERIFIED SERVICE

Yes

CLIENT SIGNATURE

Yes

VISIT SOURCE

SANDATA

GENERATE GROUP VISIT CODE

☐ DO NOT BILL

☐ APPROVED

REASON CODE *

20 DCW/NAP Error

RESOLUTION CODE *

Written Document

REASON NOTE

Reason Note

SAVE

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

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

VISIT START DATE

07/18/2019

VISIT END DATE

07/18/2019

VISIT TIME ZONE

US/Eastern

VISIT STATUS

Verified

CALL IN

02:05 PM

CALL OUT

10:30 PM

CALL HOURS

08:25

UNITS

10

ADJUSTED IN DATE

07/18/2019

ADJUSTED IN HH:MM AM/PM

02:05 PM

ADJUSTED OUT DATE

07/18/2019

ADJUSTED OUT HH:MM AM/PM

04:30 PM

AGENCY ID

25090

AGENCY NAME

Test p1 to p2 Agency

BILL HOURS

02:25

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

☐ DO NOT BILL

☒ 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	

GENERAL
CLIENT
EMPLOYEE
CALL LOG
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY

VISIT START DATE

07/18/2019

VISIT END DATE

07/18/2019

VISIT TIME ZONE

US/Eastern

VISIT STATUS

Verified

CALL IN

02:05 PM

CALL OUT

10:30 PM

CALL HOURS

08:25

UNITS

10

ADJUSTED IN DATE

07/18/2019

ADJUSTED IN HH:MM AM/PM

02:05 PM

ADJUSTED OUT DATE

07/18/2019

ADJUSTED OUT HH:MM AM/PM

04:30 PM

AGENCY ID

25090

AGENCY NAME

Test p1 to p2 Agency

BILL HOURS

02:25

PAYER

ODA

PROGRAM

PP

SERVICE

Passport HCA (S5125)

GROUP VISIT CODE

CLIENT VERIFIED TIME

No

CLIENT VERIFIED SERVICE

Yes

VISIT SOURCE

SANDATA

GENERATE GROUP VISIT CODE

☐ DO NOT BILL
☐ 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

GPS

MEMO

CLAIMS

HISTORY

VISIT START DATE

07/18/2019

VISIT END DATE

07/18/2019

VISIT TIME ZONE

US/Eastern

VISIT STATUS

Verified

CALL IN

02:05 PM

CALL OUT

10:30 PM

CALL HOURS

08:25

UNITS

10

ADJUSTED IN DATE

07/18/2019

ADJUSTED IN HH:MM AM/PM

02:05 PM

ADJUSTED OUT DATE

07/18/2019

ADJUSTED OUT HH:MM AM/PM

04:30 PM

AGENCY ID

25090

AGENCY NAME

Test p1 to p2 Agency

BILL HOURS

02:25

PAYER

Select Payer

PROGRAM

MyC

SERVICE

MyCare - LPN (T1)

GROUP VISIT CODE

CLIENT VERIFIED TIME

No

CLIENT VERIFIED SERVICE

Yes

CLIENT SIGNATURE

Yes

VISIT SOURCE

SANDATA

DO NOT BILL

APPROVED

REASON CODE *

20 DCW/NAP Error

RESOLUTION CODE *

Written Document

REASON NOTE

Reason Note

SAVE

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
EMPLOYEE
CALL LOG
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY

VISIT START DATE
07/18/2019

VISIT END DATE
07/18/2019

VISIT TIME ZONE
US/Eastern

VISIT STATUS
Verified

CALL IN
02:05 PM

CALL OUT
10:30 PM

CALL HOURS
08:25

UNITS
10

ADJUSTED IN DATE
07/18/2019

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

ADJUSTED OUT DATE
07/18/2019

ADJUSTED OUT HH:MM AM/PM
04:30 PM

AGENCY ID
25090

AGENCY NAME
Test p1 to p2 Agency

BILL HOURS
02:25

Required

Select Payer

Select Payer

Buckeye

Molina

Aetna

UHC

CareSource

SANDATA

PROGRAM
MyC

SERVICE
MyCare - LPN (T1

GROUP VISIT CODE

CLIENT VERIFIED SERVICE
Yes

CLIENT SIGNATURE
Yes

GENERATE GROUP VISIT CODE

☐ DO NOT BILL

☐ APPROVED

REASON CODE *
20 DCW/NAP Error

RESOLUTION CODE *
Written Document

REASON NOTE
Reason Note

SAVE

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	144848787875	Smith, Jane	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

VISIT START DATE

07/18/2019

VISIT END DATE

07/18/2019

VISIT TIME ZONE

US/Eastern

VISIT STATUS

Incomplete

CALL IN

02:05 PM

CALL OUT

10:30 PM

CALL HOURS

08:25

UNITS

10

ADJUSTED IN DATE

07/18/2019

ADJUSTED IN HH:MM AM/PM

02:05 PM

ADJUSTED OUT DATE

07/18/2019

ADJUSTED OUT HH:MM AM/PM

04:30 PM

AGENCY ID

25090

AGENCY NAME

Test p1 to p2 Agency

BILL HOURS

02:25

PAYER

CareSource ▼

PROGRAM

MyC ▼

SERVICE

MyCare - LPN (T1 ▼)

GROUP VISIT CODE

CLIENT VERIFIED TIME

No

CLIENT VERIFIED SERVICE

Yes

CLIENT SIGNATURE

Yes

VISIT SOURCE

SANDATA

GENERATE GROUP VISIT CODE

☐ DO NOT BILL

☒ APPROVED

CANCEL

54

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

GPS

MEMO

CLAIMS

HISTORY

VISIT START DATE

07/18/2019

VISIT END DATE

07/18/2019

VISIT TIME ZONE

US/Eastern

VISIT STATUS

Incomplete

CALL IN

02:05 PM

CALL OUT

10:30 PM

CALL HOURS

08:25

UNITS

10

ADJUSTED IN DATE

07/18/2019

ADJUSTED IN HH:MM AM/PM

02:05 PM

ADJUSTED OUT DATE

07/18/2019

ADJUSTED OUT HH:MM AM/PM

04:30 PM

AGENCY ID

25090

AGENCY NAME

Test p1 to p2 Agency

BILL HOURS

02:25

PAYER

CareSource

PROGRAM

MyC

SERVICE

MyCare - LPN (T1)

GROUP VISIT CODE

CLIENT VERIFIED TIME

No

CLIENT VERIFIED SERVICE

Yes

CLIENT SIGNATURE

Yes

VISIT SOURCE

SANDATA

GENERATE GROUP VISIT CODE

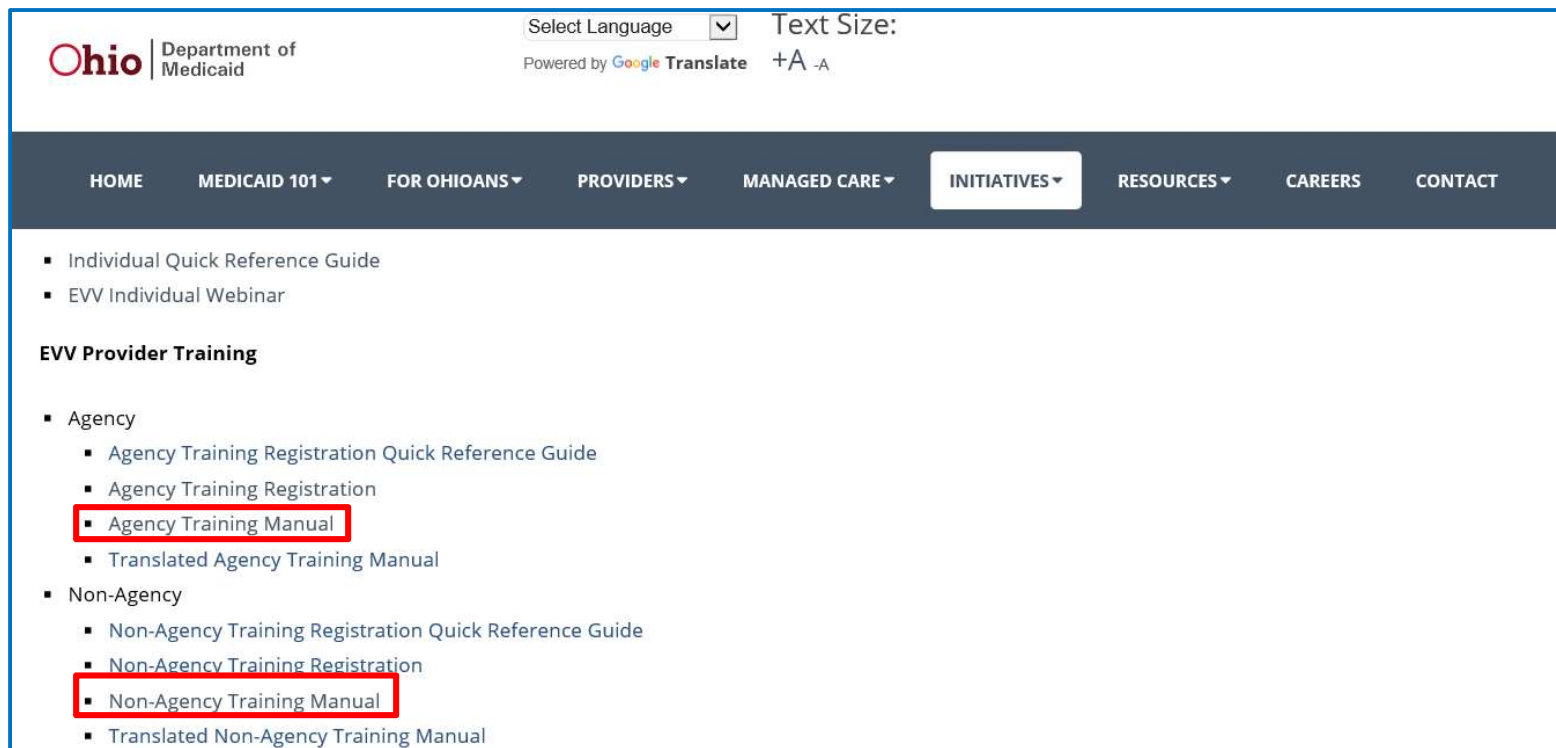
☐ DO NOT BILL

☐ APPROVED

CANCEL

Remember to refer to your training manual!

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



Ohio | Department of
Medicaid

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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

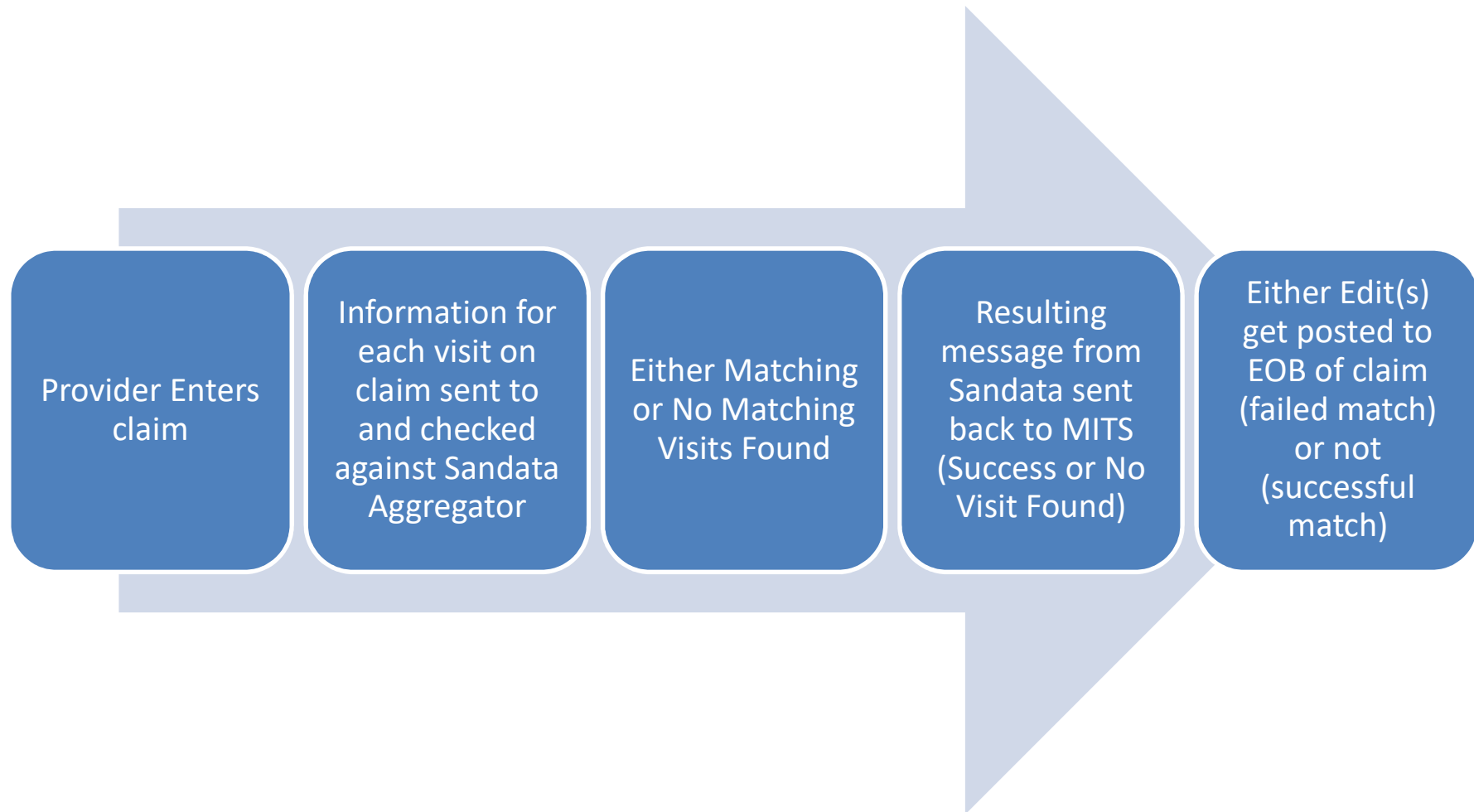
EVV Provider Hotline: (855) 805-3505

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	Error	EOB		CARC			RARC
Number	Disposition	Code	EOB Description	CARC	Amount	CARC 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	S5125	U8				
1	10/09/2018	4.00	\$11.44	\$11.44	PAID	12	S5125	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 [REDACTED]

Initial EAPG [REDACTED]

Status PAID

Visit Start Time [REDACTED] [REDACTED] [REDACTED]

Visit End Time [REDACTED] [REDACTED] [REDACTED]

Service Duration less than 90 days ☐

Place Of Service 12

Procedure Code S5125

Emergency [REDACTED]

Referred EPSDT Service/ Family Planning [REDACTED]

Diagnosis Code [REDACTED] [REDACTED] [REDACTED] [REDACTED]

Pointer [REDACTED]

Modifiers U8 [REDACTED]

Final EAPG [REDACTED]

Pay Action [REDACTED]

NDC

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 OA). 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

GENERAL	BATCH ID	TRANSACTION ID	DATE RETURNED FOR CLAIMS PROCESSING	INTERNAL CONTROL NUMBER	DETAIL LINE NUMBER	MODIFIER	BILLEC UNITS
CLIENT	12/12/2018 ...	12/12/2018 ...	12/12/2018 ...	12/12/2018 ...	05		32
EMPLOYEE	12/12/2018 ...	12/12/2018 ...	12/12/2018 ...	12/12/2018 ...	05		32
CALL LOG	12/12/2018 ...	12/12/2018 ...	12/12/2018 ...	12/12/2018 ...	05		32
EXCEPTIONS							
GPS							
MEMO							
CLAIMS							
HISTORY							

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 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?
