

# Electronic Visit Verification Fundamentals

Overview for Employees



P-03595  
(03/2024)

# Objectives

- Understand electronic visit verification (EVV) better.
- Know the purpose for EVV.
- Learn Sandata EVV methods to capture visit information.
- See features added December 2023.
- Review helpful EVV resources.

If you are attending as a new employee or interested in an EVV refresher—today's session is devoted to providing an overview.

Along with the overview, we'll share the EVV options that are provided to you by DHS.

If you have your smartphone or tablet handy—great! We'll be sharing some QR codes and tips along the way!

# EVV

- **What:** Federal law (2016) requires visit information is collected electronically.
- **How:** EVV uses technology to make sure that members and participants receive the services they need.
- **Why:** Ensure clients receive care and maintain adequate funding for those in need.

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**What is it?** In December 2016, the 21st Century Cures Act became law.

The law required that all states:

- Use technology to capture electronic visit information to ensure members (or clients) get the services they need.
- Electronically collect information about each visit.

**If a state chooses not to do so, they receive less federal funding for programs.**

**How does it work?** EVV uses technology to make sure that members and participants receive the services they need. Sometimes that technology can be very familiar, like a landline phone.

# Key Terminology

- **Sandata:** The Department of Health Services (DHS)-provided EVV vendor
- **Client:** A member or participant who receives services through Wisconsin Medicaid
- **Employee:** A person (worker) who provides care to one or more clients
- **Company ID:** The provider identification number in Sandata

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We'll cover some key terminology that will be used throughout today's training. These are the terms used within the Sandata system:

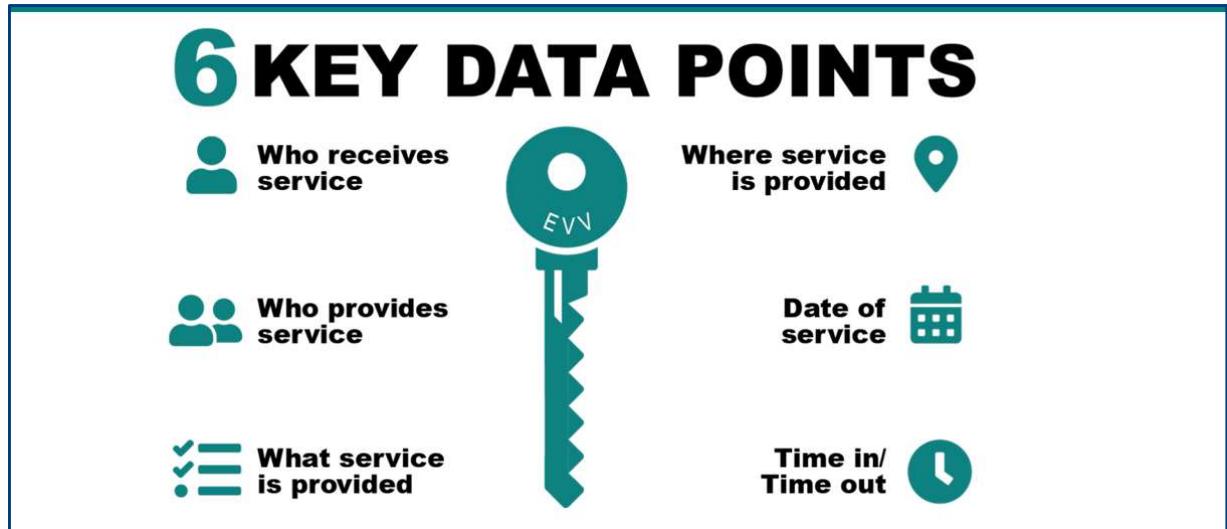
**Sandata**—The DHS-provided EVV vendor—The state purchased the Sandata system so providers can use it at no cost.

**Client**—A member or participant who receives services through Wisconsin Medicaid

**Employee**—A person (worker) who provides care to one or more clients—Independent nurses, as an “agency of one”: you have roles as both an employee and a provider agency.

**Company ID**—The provider identification number in Sandata—We'll see how this is used in just a bit.

# Federally Required EVV Data

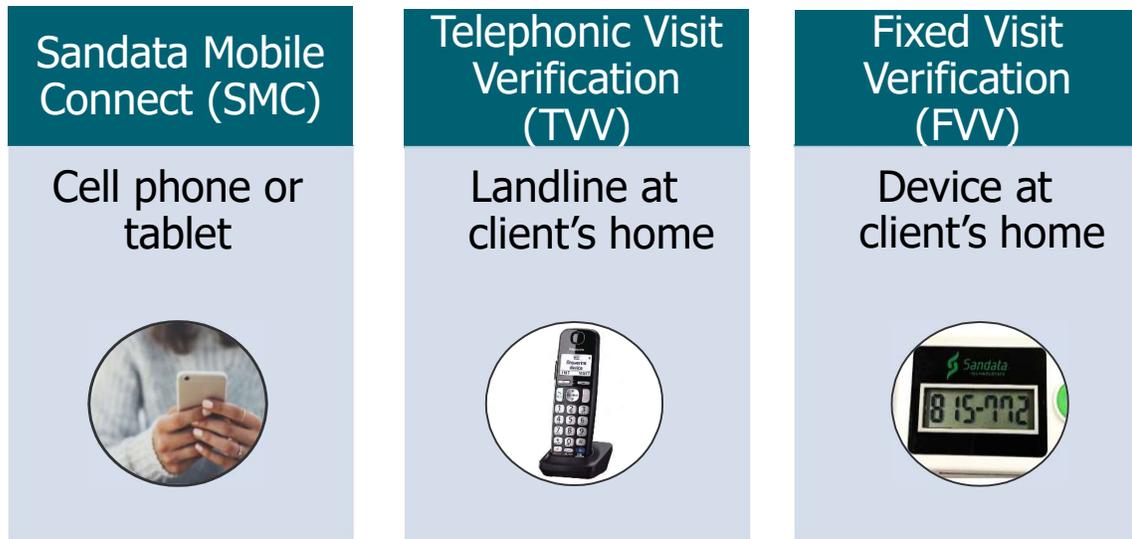


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These are the six Key Data Points that need to be captured for each visit. We will begin on the left column and work our way down.

Please note: EVV is not a system that tracks location throughout the visit. Location is only captured at the start and end of a visit.

# Methods to Collect Visit Information



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Providers can use the Sandata EVV system provided by DHS or choose to purchase their own system that meets the State's requirements. For the rest of this session, we'll be looking at the State-provided system. If you have a different system, your options and methods may not be what we discuss today.

Sandata offers three methods:

- The mobile app method—**Sandata Mobile Connect or SMC**—uses an app on a smartphone or tablet and is the most efficient and accurate method.
- The **telephonic visit verification or TVV** method uses the client's landline phone. This can be a good option if a cell phone or tablet is not available.
- The **fixed visit verification or FVV** method uses a small device that is fixed or attached in the client's home. It is the least efficient and least accurate method.

We'll be diving into each of these.

# How EVV Works



[www.youtube.com/watch?v=rt29rXY\\_td8](https://www.youtube.com/watch?v=rt29rXY_td8)

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We have a brief video—about 3 minutes—to give you a good summary. Watch how EVV works with Pat—an employee—and Sam—the client.

Let's launch that video. [https://www.youtube.com/watch?v=rt29rXY\\_td8](https://www.youtube.com/watch?v=rt29rXY_td8)

# Visit Scenario

1. Arrive at the place of service.
2. Check in using a device.
3. Provide care.
4. Check out using a device.

So we just watched a visit scenario. Here's what we saw—a simplified scenario on **when** and **how** you would use EVV. In the video we saw Pat use the SMC app and landline. Depending on which method you use:

1. You arrive at the place of service.
2. You check in using one technology.
3. You provide care.
4. Then when you're ready to leave, you follow similar steps to check out.

# EVV Worker ID Card



Wisconsin Electronic Visit Verification		
<b>WORKER VISIT CARD</b>		
Wisconsin EVV Customer Care		
833-931-2035   vdx.contactevv@wisconsin.gov   Monday - Friday 7am-6pm		
Agency's Sandata toll-free number:		
Agency/Company ID:	2-	
Worker Santrax ID:		
Sandata Mobile Connect Username:		
Client Identifier:		
Service Code(s) :		
Is recording tasks within EVV required? ___Yes ___No		

Service Code	SMC Service Code	TVV Service Code #
<b>Personal Care and Supportive Home Care Services</b>		
T1019	Personal Care Svc/15 min	10
S5125	Supportive Home Care/15 min	15
S5126	Supportive Home Care/Day	20
T1020	Personal Care/Day	25
Combo	Combo-PCS & SHC	30
99509	PCS Nurse Supervisory Visit/Visit	55
<b>Home Health Care Therapy Services</b>		
92507	Speech Therapy Individual/Visit	35
97139	Unspecified Therapeutic Procedure-OT/Visit	40
97799	Unspecified Rehab Svc-PT/Visit	45
<b>Home Health Care Nursing Services</b>		
99504	Mechanical Vent Care/Hour	50
S9123	Private Duty Nursing RN/Hour	65
S9124	Private Duty Nursing LPN/Hour	70
99600	Unspecified Home Visit-RN or LPN/Visit	60
T1001	Nursing Assessment or Eval/Visit	75
T1021	Home Health Aide or CNA/Visit	80
T1502	Med Admin-Oral, IM, Subq/Visit	85

P-02844A (10/2023)

[www.dhs.wisconsin.gov/library/p-02844.htm](http://www.dhs.wisconsin.gov/library/p-02844.htm)

Here's a **tip!**! The worker ID card is one of the best **tools** we have for you. It's available on the DHS EVV website to print out and includes space for all the information an employee needs. The provider agency can supply the information on the left side of this card. (Independent nurses, as an "agency of one," you can provide this to yourselves!) That includes:

- The toll-free phone number assigned to the provider in case you use TVV
- The agency or company ID assigned by Sandata
- Your Santrax ID to identify you as the employee
- Your SMC username, which is simply your email address
- The client ID from Sandata
- The service codes for the care you are providing

There's more about that in the chart on the right.

The first column ("service code") is information familiar to your office administrator who takes care of billing. The last two columns are the ones you want to pay attention to. Your provider will let you know which service you are doing and whether it's billed as 15-minute segments or another way. So, if your employer tells you that you are doing personal care services, that's not quite enough information. You need to know if it's the first line, **Personal care services/15 minutes** or the

second line on this chart, **Personal care/per day**.

Notice that these are very broad categories of care.

The last column on the chart is what you'll enter if you are using TVV.

The QR code on the slide will take you to this tool. To use the QR code, open up the camera on your cell phone. Hover the camera over the QR code on the slide. A link should appear; tap it, and it will bring you directly to that webpage.

One last item to point out is the question on the bottom: "Is recording tasks within EVV required? Yes or No." Your provider should let you know this answer. Let's go to the next slide for more information.

# Task ID List

Task ID	Task Description	Task ID	Task Description
100	Shower/Bathing	105	Dressing/Change
110	Prosthetics/splints/TEDS	115	Grooming
120	Assist w/Feeding	125	Mobility
130	Transferring	135	Toileting
200	Bowel Program (MOT)	205	Catheter Site Care (MOT)
210	Complex Positioning (MOT)	215	Feeding Tube Site Care (MOT)
220	Glucometer (MOT)	225	Medications: Assist/Remind (MOT)
230	Range of Motion (MOT)	235	Respiratory Assistance (MOT)
240	Skin Care (MOT)	245	Tube Feeding (MOT)
250	Vital Signs (MOT)	255	Wound Care (MOT)
300	Eyeglass/Hearing Aid(s) Care	305	Housekeeping
310	Laundry	315	Meal/Purchase Groceries

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This **task ID list** is a great job aid if your provider requires tasks to be entered using EVV. Notice that these are very specific tasks that may happen during a visit—helping with a shower, transferring, toileting. They are not the broad “services” we saw on the previous slide.

Everyone using EVV will enter the broad service category for the visit. Some employees will use EVV to enter the tasks, too.

Ask your provider if they require tasks to be included in EVV. For some providers, it provides the record of care. If your provider is not using EVV for the record of care, entering tasks like these is not required. Independent nurses are not required to include tasks in EVV.

Please follow the instructions from your provider or fiscal employer agency.

One last note—the number listed next to each task is entered if you use TVV or FVV.

# Using the SMC App



Let's shift gears to look at each of the three methods of collecting EVV information that we introduced earlier. We'll start with the SMC app.

# Sandata App

## New Version

### Old Version



Old SMC app



SMC app  
released July 2023.

Sandata has updated their app. Here's a snapshot of the two versions of the SMC app.

The old version of the SMC app, shown on the left, will be available through June 30, 2024. However, it will not be updated. As time goes on, you may find the app's performance diminishing.

DHS recommends switching to the new SMC app, which was released in July. You can search in Google Play (for Android users) or the App Store (for iPhone users) for Sandata Mobile Connect, find this icon, and download it. Be sure to look for the dark blue icon you see here on the right.

For your first use of the new app, you'll be asked to reset your password. This new password will be used any time you use a Sandata app, old or new, for any provider you work for.

Feel free to delete the old version of the app, the white icon, as soon as you've downloaded the new one.

We have more specific information about the new SMC app in our SMC Essentials webinar. We hope you'll view that recording or PowerPoint to learn more!

# Why use the SMC app?



**Faster!**



**Most Accurate**



**Fewer Exceptions**

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When using the SMC app to capture client visit information, it's much faster and more efficient for you than the other methods. Many prefer using it since there is greater accuracy. This means fewer errors, or exceptions, for a provider administrator to correct later.

It's worth repeating: The SMC app option is the most efficient and accurate.

# SMC App FAQs



1. Is EVV a timesheet?
2. Do I need to use my own unique email?
3. Is the SMC app a GPS tracker?
4. Does the SMC app work without Wi-Fi?
5. How do I reset my SMC app password?

Here are some questions that we receive the most from employees beginning to use the SMC app or planning to use it:

1. Is EVV a timesheet? **Not necessarily.** DHS does not require EVV to serve as your timesheet. Please check with your provider to see if they do require it.
2. Do I need to use my own unique email? Yes. To use the SMC app, you'll need to provide your unique email. This email will become your user ID for the SMC app. Make sure this email account is only used by you—no one else. This email will become your user ID for the SMC app.
3. Is the SMC app a GPS tracker? No. The SMC app is not a GPS tracking device for DHS or your provider. The app captures the location only at the start and end time. In between these times, location is not gathered.
4. Does the SMC app work without Wi-Fi? Yes. Visits are captured even without Wi-Fi or cell data. The SMC app will collect visit information, and when you're back in Wi-Fi range and logged in again, it will automatically upload the visit to your provider's Sandata account.

5. How do I reset my SMC app password? The password reset is an improved feature on the new SMC app. Our EVV SMC Essentials webinar will talk more about this process, so if you use the app, be sure to join us! You can reset your password from your device.

For more FAQs related to the SMC app and EVV, check them out on the DHS EVV website. We have a QR code that will take you to the site.

# Using TVV



In the video, we also saw the employee use another method—Sam’s home landline—to record the visit.

Telephonic visit verification, or TVV, is designed for the employee who doesn’t have access to a smartphone or tablet. The employee uses the client’s landline phone to check in and check out.

# Using TVV: Check-in Call

Items needed to make a check-in TVV call at the start of visit:

- The client's landline or fixed Voice over Internet Protocol (VoIP) phone
- The provider-specific TVV Call Reference Guide
- The assigned TVV toll-free phone number
- The employee's Santrax ID



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If you use TVV, here's what you'll need:

- The client's landline phone or fixed Voice over internet Protocol (VoIP). TVV is used only with the client's landline or fixed VoIP phone (for example, a phone line provided by a cable company to the client's home).
  - The client's landline or fixed VoIP phone line captures the location the same way 911 does.
  - TVV is **not** for cell phones.
- Next, the provider-specific TVV Call Reference Guide—Check with your provider. They'll have a TVV Call Reference Guide from Sandata for you that will lead you through every step of the call.
- The provider's TVV toll-free phone number. For employees who might work for multiple providers, it is important to use the toll-free phone number assigned to that specific provider! The toll-free number assigned to a provider should be listed on the TVV Call Reference Guide, it should also be written on the Worker ID card we talked about before.
- The employee's Santrax ID—This should also be written on the Worker ID card.

Remember: If you have a smartphone, use the SMC app. TVV is for landline use, not smartphone use.

# Using TVV: Check-out Call

Items needed to make a check-out TVV call at the end of visit:

- The client's landline or fixed VoIP phone
- The provider-specific TVV Call Reference Guide
- The assigned TVV toll-free phone number
- The employee's Santrax ID
- TVV service code for services performed



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For the check-out call at the end of the visit, you'll need the same information, **plus** one more item at the bottom—The TVV service code will confirm what service you performed.

For service codes, you can refer back to your Worker Visit Card.

If your provider requests you list the tasks done during your visit, you will also need the Task ID List.

And one more time: If you have a smartphone, use the SMC app. TVV is for landline use, not smartphone use.

# Using the FVV Device



We shared with you the SMC app and TVV methods. Now for an overview of the steps involved for Fixed Visit Verification, or FVV.

# Using the FVV Device



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The FVV device, about the size of an oven timer, needs to be requested from Sandata by the provider or fiscal employer agency. As a reminder, “provider” includes independent nurses who are an “agency of one.” The device is shown in the bottom right corner.

The FVV method is the most complicated process. You can see the steps here:

- Using the FVV device, the employee presses the button to get the check-in numeric code at the beginning of the service.
- This number needs to be written down accurately for later use.
- After providing the care, the employee presses the button again for the check-out numeric code at the end of the service.
- This number also needs to be written down accurately for later use.
- Later, when the employee has access to any kind of phone, they will call in the two FVV numeric codes. This call should be made at least 15 minutes after the check-out code was received, and before the codes expire in 7 days.
- Each numeric code needs to be typed in accurately, along with the service code. If tasks also need to be entered, these are also entered on that call.

If you use this method, your provider can give you the FVV Call Reference Guide from Sandata. This will lead you through every step of the call. Your provider can also give you guidelines on when you should call in these numbers. It may be the

same day or within a few days—again, at least 15 minutes after the check-out code was received, and before the codes expire in 7 days.

As you can see, it's cumbersome and more prone to entry error. And it is more limiting, since it needs to stay in the client's home. Because of this, FVV is the method of last resort.

That wraps up the three methods of collecting visit information.

# New Features December 2023



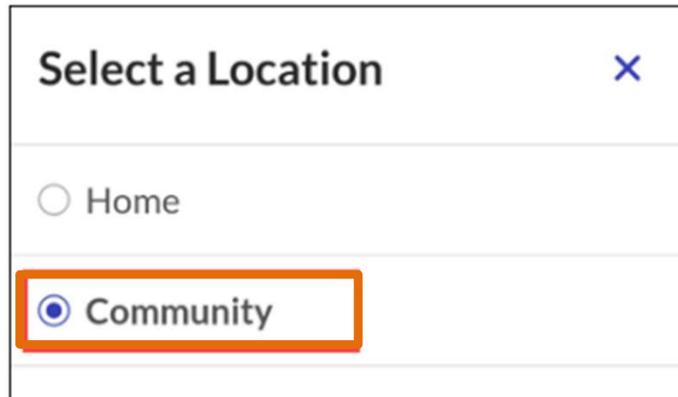
We have some new features to let you know about.

EVV will be required for some home health care services to use EVV by January 1, 2024. As part of the system preparations, you'll see some changes in SMC, TVV, and FVV. These rolled out mid-December 2023!

# New Features, December 2023

## Home or Community

- New drop-down menu on app
- New question during TVV and FVV calls



Select a Location ×

Home

Community

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The first new feature is to select where the services are provided: Home or Community. At the start and end of the visit, you'll be asked to enter if you are at the member's home or in the community with the member:

- On the SMC app, it will be on a drop-down menu at the check-in and check-out, as shown here.
- For TVV and FVV, it will be a new question when you call in and out. Sandata will email new TVV and FVV Call Reference Guides to providers with these new options listed in the script so you can be prepared. (As a reminder, EVV hasn't changed policy about where care can take place. If the client's program allows care in the community, that has not changed. If the client's program does **not** allow care in the community, that has not changed.)
- EVV does not provide an error message to tell the employee if their selection follows policy.
- Providers should let employees know where care can take place.

# New Features: December 2023

## **New Home Health Care Services (HHCS)**

- Speech therapy
- Occupational therapy
- Physical therapy
- Mechanical ventilator care
- Home visit by RN or LPN
- Private duty nursing by RN
- Private duty nursing by LPN
- Nursing assessment
- Home health aid or CNA visit
- Subcutaneous medication

## **New Personal Care Services (PCS)**

Nurse supervisory visit

## **Current PCS**

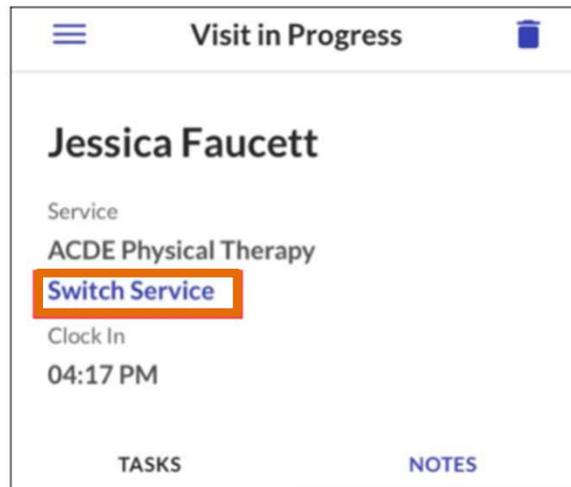
- Personal care per 15 minutes
- Personal care per day
- Supportive home care per 15 minutes
- Supportive home care per day

The second new feature: there will also be more service codes listed. This is in preparation for EVV being required for the home health care services listed, and the one additional personal care service listed.

# New Features, Coming Up

## Switch Services

- New area on app
- New question during TVV calls
- Separate calls for FVV



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In December 2023 we saw another new feature is an option to switch services: Sometimes, care is provided in more than one service category. If you are changing from one service category to another (for example, personal care to supportive home care), you can continue the same visit and simply switch services. In the past, you'd have to check out and then check back in again. This will be a time saver for those who provide more than one service during a visit!

- On the SMC app, it will be shown as a new blue option on the visit screen, as shown here. For more on how this works on the app, please be sure to attend our SMC Essentials webinar!
- For TVV, it will be a new question on the phone line. The employee will call the TVV line and follow the "calling out" script for that mid-visit change. Sandata will send new TVV Call Reference Guides to providers with these new options listed in the script so you can be prepared.
- Because FVV devices are low-tech, switching services works a little differently. The employee will use the device to gather in and out numeric codes for each service, and later make separate calls for each service. If two services were provided, the FVV user would have two sets of in and out numeric codes and would make two calls later.

If you are with IRIS and use Sandata, you may have used the Combo code for visits with personal care **and** supportive home care. You can continue to select the

Combo code as before.

# Training Resources

# EVV Training Workers Resources



[www.dhs.wisconsin.gov/evv/training-workers.htm](http://www.dhs.wisconsin.gov/evv/training-workers.htm)

The screenshot shows the Wisconsin Department of Health Services website. The header includes the department logo and navigation links for 'About DHS', 'Data & Statistics', 'Diseases & Conditions', 'Health Care & Coverage', 'Long-Term Care & Support', 'Prevention & Healthy Living', 'Partners & Providers', and 'Certification, Licenses & Permits'. A search bar is located in the top right corner. The main content area is titled 'Electronic Visit Verification (EVV): Training Workers'. It includes a sidebar with links for 'EVV: Home', 'What's New', 'Members', 'IRIS', 'Providers', 'Payers', 'Alternate EVV', 'Training', 'Resources and FAQs', and 'Contact Us'. The main text explains that the resources are for training workers and provides a link to 'Training Workers for Electronic Visit Verification'. A table lists available resources:

Resource Title	Description	Languages Available
<b>General</b>		
EVV Informational Video	Learn what EVV is and how EVV information is collected during a visit by watching this short video (2:58 minutes)	English
EVV Fundamentals - An Overview	A video to learn the purpose of EVV, the methods for verifying a client visit, steps needed to start implementing EVV.	English

At the bottom of the sidebar, there is a 'Stay connected' section with a link to 'Join our email list' and a 'Have questions? Need' link.

For anyone new to the EVV employee role—or anyone who needs a refresher on a specific EVV process or topic—there are plenty of training resources.

Either the QR code or link will take you to our DHS EVV Training Workers webpage. Browse the page; you'll find videos and printable materials available in English, Spanish, Hmong, and other languages. We'll be updating that webpage with resources showing the new features over the next few weeks.

A recording of this webinar and the SMC Essentials webinar are here, too!

Here's a tip to use on this or any webpage: if you're viewing this page on a laptop or desktop computer, use your keyboard's "Ctrl" key at the same time as the "F" key. This will open a "Find" search box for that one webpage. You can then type in any key words—like SMC, Fundamentals, or TVV—to find them on that specific webpage.

# Worker or Administrator Support

## Wisconsin EVV Customer Care

- Phone: 833-931-2035
- Email: [vdxc.contactevv@wisconsin.gov](mailto:vdxc.contactevv@wisconsin.gov)
- Monday–Friday: 7 a.m.–6 p.m. CT



Here's the best resource that we have—anyone in the room can talk with our Wisconsin EVV Customer Care agents. They're available to assist you with any EVV needs.

For example, workers can contact them for questions about:

- Resetting passwords.
- Using technology.
- Finding additional training resources.

Additionally, administrators can contact them for questions about:

- Editing visits.
- Accessing reports.
- Ordering or returning FVV devices.
- Setting up individualized assistance.

Independent nurses, who are both workers and administrators, can call about any of these topics.

EVV Customer Care can be reached by phone or email Monday–Friday, from 7 a.m.–6 p.m. Central time.

Thank you!