

IHCP Live

Electronic Visit Verification

Indiana Family and Social Services Administration
Office of Medicaid Policy and Planning
IHCP Live



Full EVV Enforcement

- **BT2023145** – Announced full enforcement of EVV for personal care services
 - Claims processed between November 15 and December 15, 2023
 - Edit will be temporarily turned off on December 16, 2023
 - Final date will be April 2024

EVV for home health remains in post-and-pay until later in 2024



Common Sandata Issues:

- Logging On
- Adding Client Data
- Adding Employee Data



Prevent Getting Locked Out



* indicates required field

AGENCY

Leave the STX when logging in

USERNAME *

Use the "Remember Me" for retention of STX and Username

PASSWORD *

Use the "eyeball" to ensure the Password is correct

 REMEMBER ME

LOGIN

FORGOT PASSWORD?

After two failed logon attempts, choose "Forgot Password"

Educate Employees to choose
Forgot Password on Sandata
Mobile Connect (SMC)!



Basic Client Info

Pay attention to the correct payer!



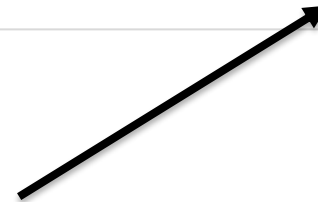
Add/Edit Payer X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	SUPERVISOR
Smithxx, Johnxx	None	100100100100	None

PAYER *	PROGRAM *	SERVICE *
INFSSA	Indiana	Respite (AMHH)

CLIENT PAYER ID	START DATE * MM/DD/YYYY	END DATE MM/DD/YYYY
Enter Client Payer Id	08/20/2019	08/31/2022

Span the start/stop date!



Client Address/Phone

Primary Address

ADDRESS TYPE *
Home

ADDRESS LINE 1 *
123 ABC Street

ADDRESS LINE 2
Enter Address Line 2

CITY *
Indianapolis

STATE *
IN

ZIP CODE * 00000-0000
46000

View/Add Additional Address

Phone Number

PHONE TYPE	PHONE NUMBER (000) 000-0000	
Home	(317) 555-5555	X

ADD

Client phones

No Data

- If a client has more than one address where they can receive services, add each additional address to the record
- If client has more than one phone number, add each phone number to Client record

Employee Data

Sandata EVV

Data Entry Data Entry / Create Employee

← GO BACK

SAVE CANCEL

Basic

FIRST NAME * LAST NAME *

Grace Caregiver

EMPLOYEE ID EMPLOYEE OTHER ID

Enter Employee ID Enter Employee Other

SANTRAX ID EMAIL ADDRESS NOT CASE SENSITIVE

Enter Santrax ID gcaregiver@mailnator.com

Primary Address

Employment

DEPARTMENT DISCIPLINE

Select Department Select Discipline

EMPLOYEE CUSTOM ID PAY RATE

Enter Employee Cus Enter Pay Rate

MOBILE USER

- Verify/Test email entered is correctly entered
- Always check the “**MOBILE USER**” option
- Users must be added as employees if they provide care
- Keep employee files current

Combating Common EVV Problems



Telephonic Visit Verification (TVV)

- TVV is intended for use from the phone associated with the Client file
- Only use TVV when SMC is not available
- Only use TVV from Client assigned phone number

Can be a cell phone or landline!















Images: Flaticon.com

Calling Instructions

Calling In: When arriving at the client's home, make sure you have the following information:

- Your Santrax ID.

Remember: When speaking to Santrax on any toll-free line, speak in English, slowly and clearly one digit at a time (1075 = one, zero, seven, five).

1.  Dial any of the toll-free numbers assigned to your agency.
If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.
 Santrax will say: "Welcome, please enter your Santrax ID."
2.  Press the numbers of your Santrax ID on the touch tone phone.
 Santrax will say: "Is this a group visit? Press (1) for Yes or (2) for No."
3.  Press (2) for not a group visit.
 Santrax will say: "Please select "1" to call in or "2" to call out."
4.  Press the one (1) key to "Call In".
 Santrax will say: "Received at (TIME) Please enter first client ID or hang up."
5.  Enter the ID for the first client receiving service.
 Santrax will say: "Please enter second client ID or hang up if done."
6.  Enter the ID for the second client receiving service.
7. Follow the prompts to enter client IDs until all clients that share this call time have been entered.
NOTE:
If you enter the maximum number of clients allowed by Santrax, after entries are finished, the system will say: "Thank you, bye."
8.  Hang up.

Altering EVV Records

- Records with errors (incomplete) MUST be corrected so they show as a “Verified” record prior to billing.
- “Verified” EVV records should not be altered unless there is an error in the data.
- EXAMPLES
 - The employee forgot to punch in and punched in later
 - The wrong client is listed as the client that received the service

Changing a valid, complete, correct record creates a false record!



How To Prevent Exceptions and EVV/Claim Match Issues

- Provide employee education
- Enter all visits that are missing
 - Ensure supporting documentation is retained for no less than seven years
- Review all EVV for span date to ensure no exceptions remain on EVV record
- Only supported EVV services should be billed

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	Approved	Actions
		RH20 (CIH)	08/15/2022	09:28 AM	●		09:28 AM				In Process	<input type="checkbox"/>	<input type="checkbox"/>	/
		RH20 (CIH)	08/15/2022	08:52 AM	●		08:52 AM				In Process	<input type="checkbox"/>	<input type="checkbox"/>	/
		●	08/15/2022	07:56 AM	●		07:56 AM				In Process	<input type="checkbox"/>	<input type="checkbox"/>	/
		Skills Training	08/15/2022	07:27 AM	●		07:27 AM				In Process	<input type="checkbox"/>	<input type="checkbox"/>	/
	●	PAC (FSW)	08/14/2022	●	07:05 PM			07:05 PM			Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	/
		RH20 (CIH)	08/14/2022	04:58 PM	10:05 PM	05:07	04:58 PM	10:05 PM		05:07	Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	/
●		RH20 (CIH)	08/14/2022	●	04:01 PM			04:01 PM			Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	/
		●	08/14/2022	10:57 AM	●		10:57 AM				In Process	<input type="checkbox"/>	<input type="checkbox"/>	/
●		●	08/13/2022	03:59 PM	09:03 PM	05:04	03:59 PM	09:03 PM		05:04	Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	/
		●	08/13/2022	02:01 PM	●		02:01 PM				Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	/



Problem-Solving Claim Denials

Explanation of Benefits (EOB)	Questions to ask:
0951	<ul style="list-style-type: none">• Are you reviewing the Sandata Aggregator to ensure there are verified records for the date(s) of service on the claim?• If using an alternative vendor, did you bill after your vendor submitted records to the Aggregator?• Is your vendor up-to-date on technical specifications identifying specific services?• Did you select the correct service to be billed against the EVV record?
0952	<ul style="list-style-type: none">• Did you bill at or below the number of units reflected on the EVV record(s), especially if the billing was over a period of time?



Claim Tips (1)

- Mismatch between the EVV record amount and the units billed on the claim (due to incomplete records):

Related History					
Detail Number	1	Status	PAY	Rend Provider ID	
Procedure	T2016	Diag Ind	1	Ref Provider1 ID	
Modifier 1	U7	FDOS	06/01/2022	Ref Provider2 ID	
Modifier 2	U5	TDOS	06/30/2022	Billed Amt	\$8,341.65
Modifier 3		Emergency	No	Allowed Amt	\$8,341.65
Modifier 4		Copay		OI Amt	\$0.00
POS	12	Other Ins		Paid Amt	\$8,341.65
Pregnancy		Medicare Disclaimer		Units Billed	333.00

In the Sandata Aggregator, this member only had **130.75 verified** units

- **SOLUTION** – Make sure to clear any exceptions and verify records/unit amounts



Claim Tips (2)

- Mismatch between the EVV record amount and the units billed on the claim (just not enough units):

TO DATE	VISIT TIME ZONE	VISIT STATUS
06/29/2022	US/Eastern	Verified
CALL OUT	CALL HOURS	UNITS
01:58 PM	04:53	20
ADJUSTED OUT	BILL HOURS	
01:58 PM	04:53	

PAY	Rend Provider ID	
1 2 3 4	Ref Provider1 ID	
06/29/2022	Ref Provider2 ID	
06/29/2022	Billed Amt	\$186.24
No	Allowed Amt	\$186.24
	OI Amt	\$0.00
	Paid Amt	\$186.24
er	Units Billed	32.00

SOLUTION – Make sure to clear any exceptions and verify records/unit amounts



Claim Tips (3)

- Mismatch between the EVV record amount and the units billed on the claim (extending beyond the calendar month):

1	Status	PAY	Rend Provider ID	
S5125	Diag Ind	1	Ref Provider1 ID	
U7	FDOS	06/26/2022	Ref Provider2 ID	
UA	TDOS	07/02/2022	Billed Amt	\$1,164.00
	Emergency	No	Allowed Amt	\$1,164.00
	Copay		OI Amt	\$0.00
12	Other Ins		Paid Amt	\$1,164.00
	Medicare Disclaimer		Units Billed	200.00

EVV activity will only match during the same calendar month being billed.

- **SOLUTION – Stay within the calendar month for billing**



Claim Tips (4)

- **EVV Record Updates Performed After Claim Billing (major concern for alternative vendor users):**

Claim Type	Professional Claims	Status	PAY @
FDOS	06/09/2022	Details	1
TDOS	06/09/2022	Billed	\$116.38
Date Billed	07/20/2022	Net Billed	\$116.38
Payment Date	07/27/2022	OI	\$0.00
Hosp FDOS	01/01/1900	Cost Share	\$0.00
Hosp TDOS	01/01/1900	Paid	\$116.37
ICD Version	ICD-10	Reimbursed	\$116.37

ITEM	DATE
Visit Received	7/25/2022 3:51:10 PM

EVV activity needs to be posted into the Aggregator prior to billing.

SOLUTION – Ensure your alternative vendor uploads data on a regular basis.


Claim Tips (5)

- **Incorrect Service Selected on EVV Record:**

Related History ✕

Detail Number	1	Status	PAY
Procedure	T2016	Diag Ind	1
Modifier 1	U7	FDOS	06/01/2022
Modifier 2	U5	TDOS	06/30/2022
Modifier 3		Emergency	No
Modifier 4		Copay	
POS	32	Other Ins	
Pregnancy		Medicare Disclaimer	

Claim Billed as RH10 (Residential Habilitation, 35 or Less Hours)

CALL IN			
CALL DATE	CALL TIME	CALL TYPE	SERVICE
06/15/2022	08:45 AM		RH10 (CIH)
USER	CALL SOURCE		
	SANDATA 		

EVV record chosen as RH20 (Residential Habilitation, Over 35 Hours)

SOLUTION – Verify that your caregivers are selecting the right service; verify that your alternative vendor is following the technical specifications for service identifications



Claim Tips (6)

- High Number of Manual Records:

Example of a provider reviewed



Start Call Type	Total
MANUAL	814
MVV	65
(blank)	4
Grand Total	883

SOLUTION – Only use manual records on an emergency basis



Claim Tips (7)

- No EVV records uploaded

* indicates required field

AGENCY	CLIENT	MEDICAID ID #	EMPLOYEE	EM
<input type="text"/>	<input type="text" value="Enter Client"/>	<input type="text" value="Enter Medicaid ID #"/>	<input type="text" value="Enter Employee"/>	<input type="text" value=""/>
DATE RANGE * MM/DD/YYYY		VISIT STATUS	FILTER VISITS BY	
<input type="text" value="06/01/2022"/> <input type="text" value="06/30/2022"/>		<input type="text" value="All"/>	<input type="text" value="All Visits"/>	

No Data Found!

SOLUTION – Verify your alternative vendor is submitting records; verify your direct care workers are capturing visits



What is the overall message?

Review EVV prior to billing



Sandata Zendesk

- Short and easy to understand video instructions for the Sandata Portal and Aggregator
- Sign up with the email
- Option to log a Ticket and track Existing Tickets

Sandata
Get more right from the start

CONTACT US SIGN IN

Sign in to Sandata Technologies

Email

Password

Sign in

Forgot my password

New to Sandata Technologies? Sign up
Have you emailed us? Get a password
If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

How Can We Help? Start by typing key words such as "Export Invoice" or "Merge Client"

Training Information
Full Product Video Library - LMS Info and Training Guides

Caregiver Start-Up
Welcome to the Caregiver Start Up Library. Learn more about using the Mobile App and Telephone Visit Verification wit...

EVV Vendor Solutions
Documentation per state program used for the EVV Vendor Solution Interface.

Getting Started
Self-Help and Ticket Center

Quick Reference Guide (QRG)

<https://sandata.zendesk.com/hc/en-us>



Use Available Resources

Sandata
EVV

- Q Navigate Modules
- Dashboard
- Visit Maintenance
- Reports
- Data Entry
- Security
- Online Manual

Sandata
TECHNOLOGIES

Sandata Electronic Visit Verification



Possible Pitfalls and Information



Providers With Multiple IHCP Provider IDs

- **Sandata Portal User**
 - Each IHCP Provider ID for each IHCP-enrolled location providing services that require EVV reporting must individually use an EVV solution for each enrolled location
- **Alternative EVV User**
 - Include each Medicaid Provider ID in your request for each location needing testing credentials



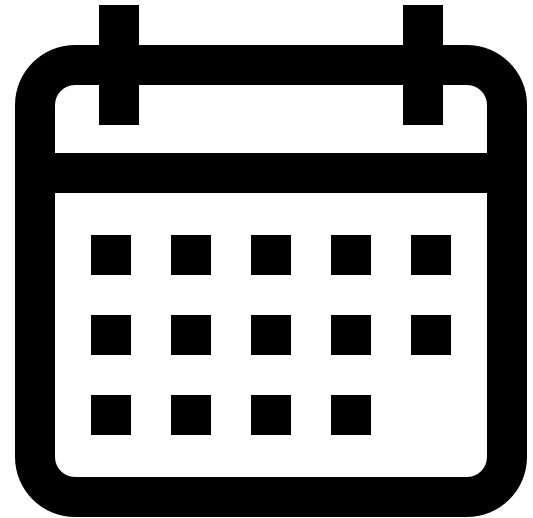
Claim Adjustments



- If a claim is adjusted or voided, it does **not** impact the EVV record
- A new claim will continue to look for the same EVV record

Retroactive NOA or Prior Authorization?

- Information on the NOA or PA must be entered on the Client file
- Create manual EVV records for services newly covered by the retroactive NOA or PA



How Is Billing Impacted by EVV?

- Billing policies have not changed
 - IHCP Policy on units and rounding have not changed with the implementation of EVV
- Services can only be billed **AFTER** they are provided

IMPORTANT NOTE: To minimize any issues with the EVV records, FSSA requires billing at increments at no greater than one month.



Are Tasks Required To Be Completed?



- The EVV record is looking for service code and modifier combinations, not the tasks – task information is useful for record keeping; but for claim adjudication, tasks have no bearing
 - **Tasks will not impact the overall EVV record**

For Alternative Users – TaskID is an optional field.

How Does an EVV Record Work With Overnight Shifts?

- Employee should still clock-in when arriving and clock-out upon finishing the overnight shift
 - **Employees do not need to call-in and call-out before midnight to create two separate EVV records**
- Provider agency should continue to bill normally based upon the units provided



How Do I Get My Welcome Kit?

- **Step 1: Complete the EVV training**
 - Self-paced
- **Step 2: Email INXIXEVV@gainwelltechnologies.com**
 - Include IHCP Provider ID for **each** IHCP-enrolled location
 - Include your certificate of completion

How Do I Navigate Sandata Customer Care?

- **State-Sponsored EVV Solution User**
 - Tier 1: *Call IHCP Help Desk (800-457-4584, Option 5)*
 - Tier 2: Sandata Customer Care (warm handoff)
 - Tier 3: No direct access to agencies
- **Alternative EVV Solution User**
 - Contact your vendor first
 - Contact Sandata (INAltEVV@sandata.com)

What Happens if I'm Not Getting a Response From Sandata Customer Care?

Please send an email to inxixevv@gainweltechnologies.com

- Include Sandata Customer Care Ticket Number

KEY TIP: Make sure to watch for communications that may go into your SPAM folder so that you do not miss an important communication update from Sandata.

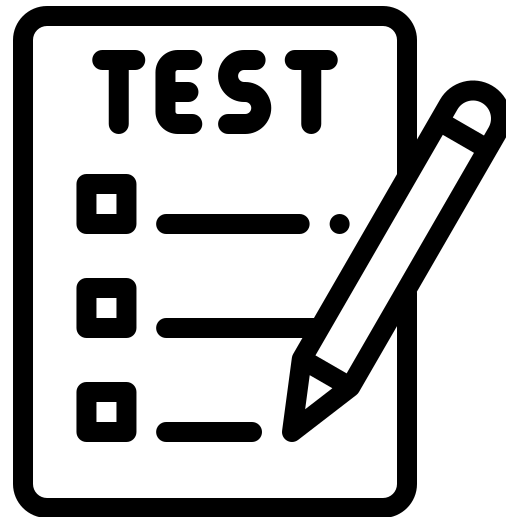


Alternate Vendor Specific Questions



How Long Should It Take to Receive My Production Credentials (and What Is the Process)?

- **If your vendor has passed testing with an agency in Indiana** – request will be processed within several days of receipt
- **If your vendor has not passed testing with an agency in Indiana** – request will depend upon how long it takes for your vendor to complete testing



Images: Flaticon.com



Process for Alternate EVV Credentials

Provider Agency Step 1

- Send request to IN FSSA EVV at EVV@FSSA.IN.GOV for approval to proceed with the testing and integration process.
- Upon approval from IN FSSA EVV, proceed to Provider Agency Step 2.

Provider Agency Step 2

- Send request to INAltEVV@Sandata.com
- Agency will receive small survey – 3 to 7 questions
- Sandata will confirm receipt
- No additional action require by the Provider Agency

EVV Solution Vendors

- Sandata will reach out to EVV Vendor Solution
- Vendor will receive small survey – 3 to 7 question
- Sandata will confirm Receipt of survey details
- Sandata will create and send testing credentials and testing certification check list



What Should I Do if I'm Not Seeing My Visits in the Sandata Aggregator?

Contact your vendor



Images: Flaticon.com










EVV Resources



EVV Webpage

The **Electronic Visit Verification webpage** - located under the Business Transactions tab

The screenshot shows the IN.gov website navigation menu. The 'BUSINESS & AGRICULTURE' tab is selected, and the 'Business Transactions' sub-tab is highlighted. The dropdown menu for 'Business Transactions' is open, and 'Electronic Visit Verification' is circled in black. The 'Electronic Visit Verification' sub-page content is visible on the right side of the dropdown menu.

MENU	IN.gov	BUSINESS & AGRICULTURE	RESIDENTS	GOVERNMENT	EDUCATION	TAXES & FINANCE	VISITING & P
 INDIANA MEDICAID for Providers	 Provider Enrollment	 Provider References	 Provider Education	 Business Transactions	 Clinical Services	 About IHCP Prog	
IHCP Provider Healthcare Portal							
Eligibility verification							
Qualified Provider Presumptive Eligibility (PE)							
Electronic Visit Verification							
Electronic Data Interchange (EDI) Solutions							
Billing and Remittance							
Program Integrity							
Health Insurance Portability and Accountability Act (HIPAA)							
Indiana Medicaid Promoting Interoperability Program							

Electronic Visit Verification

The IHCP will implement an electronic visit verification (EVV) system for federally required provider documentation of designated personal care and home health services.

EVV Preparation Guide


EVV

Electronic Visit Verification Preparation

COMPLIANCE DATE: January 1, 2021

Failure to comply with this requirement will result in claims payment disruption.

What is EVV?



The 21st Century Cures Act directs state Medicaid programs to require providers of personal care services to use an "electronic visit verification" system to document services rendered. Federal law requires that providers use the EVV system to document the following information:

- » Date of service
- » Location of service
- » Individual providing service
- » Type of service
- » Individual receiving service
- » Time the service begins and ends

Providers may choose between two technology options to use for Electronic Visit Verification:

Sandata (State-Sponsored EVV Solution)	This is available to all personal care service providers at no cost to the provider. This solution meets the federal requirements but does not provide additional functionality.
Alternative EVV Solution	Providers may also use any other vendor that has integrated in Indiana with the Sandata solution. Alternative vendors may provide additional functionality to providers.

Available resources

Electronic Visit Verification: This webpage provides all of the latest IHCP policy guidance on EVV implementation as well as helpful information for both Sandata and alternative EVV vendor users.

Sandata On Demand: This webpage contains all of the educational reference material for Sandata users.

How to prepare for implementation

For providers using Sandata (State-Sponsored EVV Solution)

Step 1: Complete the Sandata training
Providers can complete this training using self-paced online training.
For instructions on accessing the self-paced training, go to the [Registering for the Sandata Learning Management System](#).

Step 2: Receive your login credentials
After providers have completed the training, they will need to email their certificate of completion to INXIXEVV@gainwelltechnologies.com to receive their agency's Sandata login credentials.

Step 3: Enter your employee and client information
Each employee will have his or her own login information for the Sandata system. The agency will want to create logins for each employee as well as insert information about the agency's clients receiving personal care services.

Step 4: Provide employees with appropriate devices
If the agency is planning to use mobile visit verification using Sandata Mobile Connect, it will want to ensure its employees have access to a smart device. Providers can use either Android or Apple devices. Otherwise, employees should be trained to use telephonic visit verification.

Step 5: Prepare your direct care workers
The agency will want to ensure that their direct care workers have had individual training on capturing visits either through the Sandata Mobile Connect application or through telephonic visit verification.

For providers using an alternative EVV vendor

Step 1: Send an email to EVV@fssa.in.gov
The agency will want to include the agency's name and contact information along with the alternative vendor's name and contact information. This will allow FSSA to determine if the vendor has previously integrated with Sandata in Indiana. If the vendor has not previously integrated, it will be required to pay a one-time fee.


Step 2: Request testing credentials from INAltEVV@sandata.com
When Sandata has informed the alternative vendor that they are ready to begin testing, the provider agency should request testing credentials for the vendor. These credentials should be provided to the vendor.

Step 3: Work with the vendor to complete the testing process
With the testing credentials, the vendor will prepare a test file that will be submitted to Sandata for approval. The provider agency will need to stay in contact with the vendor during this process. Be sure to have the vendor submit a notification to INAltEVV@sandata.com or 855-705-2407 after the test files have been submitted to Sandata for review.

Step 4: Complete the self-paced training
While the vendor is testing, the provider agency should complete a [brief training](#) on the usage and functionality of the Sandata Aggregator.

Step 5: Request production credentials
With training complete, and after testing has been confirmed, provider agencies will request production credentials that will be used to log in to the Sandata Aggregator.

Contact us by phone at **800-457-4584, option 5** or by email at evv@fssa.in.gov



Office of Medicaid Policy & Planning

Family & Social Services Administration
Office of Medicaid Policy & Planning
402 W. Washington St., Room W374
Indianapolis, IN 46204

EVV Verification Preparation Guide

- Provides key requirements
- Provides step by step guide for implementation
- Provides contact information for questions or issues

Available on the Indiana Medicaid EVV Webpage



Provider Resources Available



Resources Available

- **What resources are available to providers?**
 - [Regional Field Consultants](#)
 - [Provider Reference Materials](#)
 - [Webinars](#)



Sign Up for Updates!

- Register for updates on the Indiana Medicaid Provider Website:
 - Email Address

Get Important News & Updates

Sign up for email and/or text notices of Medicaid and other FSSA news, reminders, and other important information. When registering your email, check the category on the drop-down list to receive notices of Medicaid updates; check other areas of interest on the drop-down list to receive notices for other types of FSSA updates.



How To Resolve Questions

- EVV@fssa.in.gov
 - To ask policy-specific questions
 - To get started with an alternative EVV vendor
- INXIXEVV@gainweltechnologies.com
 - To receive your agency's Sandata State Solution Welcome Kit
 - General EVV education
 - Sandata Portal and Aggregator assistance
 - EVV claim issues
 - EVV virtual meetings
- **The IHCP Help Desk: 800-457-4584, Option 5**
 - For technical assistance using the Sandata State Solution



Provider Relations Consultants



Region	Consultant	Email	Telephone	Counties Served
1	Jean Downs (F) Katie Grause (I)	INXIXRegion1@gainwelltechnologies.com	317-488-5071	Dekalb, Elkhart, Fulton, Jasper, Kosciusko, LaGrange, Lake, LaPorte, Marshall, Newton, Noble, Porter, Pulaski, St. Joseph, Starke, Steuben, Whitley
2	Shari Galbreath (F) Jennifer Collins (I)	INXIXRegion2@gainwelltechnologies.com	317-488-5080	Allen, Adams, Benton, Blackford, Cass, Carroll, Clinton, Delaware, Fountain, Grant, Howard, Huntington, Jay, Madison, Miami, Montgomery, Randolph, Tippecanoe, Tipton, Wabash, Warren, Wells, White
3	Crystal Woodson (F) Jeannette Curtis (I)	INXIXRegion3@gainwelltechnologies.com	317-488-5324	Boone, Hamilton, Hendricks, Johnson, Marion, Morgan
4	Jenny Roberts (F) Emily Redman (I)	INXIXRegion4@gainwelltechnologies.com	317-488-5153	Clay, Crawford, Daviess, Dubois, Gibson, Greene, Knox, Lawrence, Martin, Orange, Owen, Parke, Perry, Pike, Posey, Putnam, Spencer, Sullivan, Vanderburgh, Vermillion, Vigo, Warrick
5	Tami Foster (F)	INXIXRegion5@gainwelltechnologies.com	317-488-5186	Bartholomew, Brown, Clark, Dearborn, Decatur, Fayette, Floyd, Franklin, Hancock, Harrison, Henry, Jackson, Jefferson, Jennings, Monroe, Ohio, Ripley, Rush, Scott, Shelby, Switzerland, Union, Washington, Wayne



Questions?

Indiana Family and Social Services Administration
Office of Medicaid Policy and Planning
!HCP Works October 2023

