

Sandata EVV Guidelines

Group Visits

1. What are Group Visits?

- a. Group Visits are defined as:
 - i. 2 caregivers working with one member or
 - ii. 1 caregiver working with two or more members.

2. How to capture a group visit

- a. Currently, Sandata is unable to accommodate group visits. Below are the steps to capture a group visit.
- b. Schedule the first caregiver as normal.
- c. The second caregiver would “Start Unknown Visit” and enter clients first and last name. Medicaid ID is not required.
- d. The member can be linked to the visit in “Visit Maintenance”. The name of the client will be available in the memo tab of the visit in Visit Maintenance.

Claims

1. What to do when an EVV related claim line denies

- a. When an EVV related claim denies due to “Unmatched Units”, it means the number of “Verified/Approved/Processed” units in Sandata are not equal to or greater than what was submitted on the claim.
- b. If using Sandata for EVV visit capture:
 - i. Be sure the Visit Exceptions are acknowledged for all the member’s visits related to the claim line
 - ii. Be sure the visit status is Verified/Approved/Processed, and the units add up in Sandata to be equal to or greater than what is on the claim line.
 - iii. Wait until the next business day, then submit a new claim
- c. If using an Alternate EVV vendor for visit capture:
 - i. Contact your Alt EVV vendor for instructions on how to update visits
 - ii. Be sure the visit status is Verified/Approved/Processed and the units add up in Sandata to be equal to or greater than what is on the claim line.
 - iii. Wait until the next business day, then submit a new claim

Authorizations

1. What to do when an authorization is missing or incorrect

- a. Notify the health plan if an authorization is missing or looks incorrect via email MMEVVAUTHing@hmsa.com. Only include the authorization number in the email because it is a HIPAA violation if member information is sent unencrypted.
- b. If using Sandata for EVV visit capture:
 - i. Include your agencies 5-digit Sandata account number 85xxx and your agencies 6-digit Medicaid Provider ID in the email

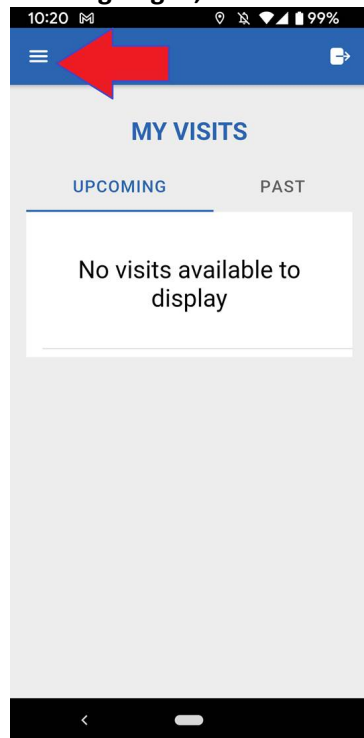
- ii. Continue services by instructing the caregiver to "Start Unknown Visit" to log unscheduled visits.
 - An exception for the authorization will post to the visit.
 - Once the authorization issue is fixed or a new authorization is issued, you can fix the exception and link the authorization to the visit. The name of the client will be available in the memo tab of the visit in Visit Maintenance.
- i. For technical questions, review the training material found here [EVV Training \(wistia.net\)](#)
- ii. For technical issues open a ticket by emailing HCustomerCare@sandata.com
- c. If using an Alternate EVV Vendor for visit capture:
 - i. Contact your Alt EVV vendor for instructions on how to update the authorization in their system.

2. What to do when services will exceed the current authorization

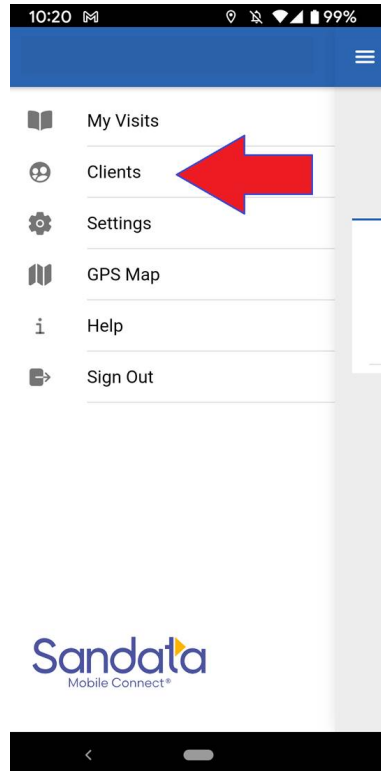
- a. When you see an authorization is about to expire/run out of available units, contact the health plan to request additional authorizations. If sending an email, only include the authorization number in the email because it is a HIPAA violation if member information is sent unencrypted.
- b. If using Sandata for EVV visit capture:
 - i. If you have requested and are expecting an updated authorization, continue with the services by instructing the caregiver to "Start Unknown Visit" to log visits.
 - An exception for the authorization will post to the visit.
 - Once you have a new authorization/extended authorization, you can fix the exception and link the authorization to the visit. The name of the client will be available in the memo tab of the visit in Visit Maintenance.
 - ii. If you will not be receiving an updated authorization, adjust the visit by updating the Adjusted Call-In or Adjusted Call-Out time to reduce the units down to the authorized amount.
 - iii. For technical questions, review the training material found here [EVV Training \(wistia.net\)](#)
 - iv. For technical issues open a ticket by emailing HCustomerCare@sandata.com
- c. If using an Alternate EVV Vendor for visit capture:
 - i. Contact your Alt EVV vendor for instructions on how to capture visits and update them according to the authorization.

3. How to capture an EVV visit using Sandata SMC when there is no authorization:

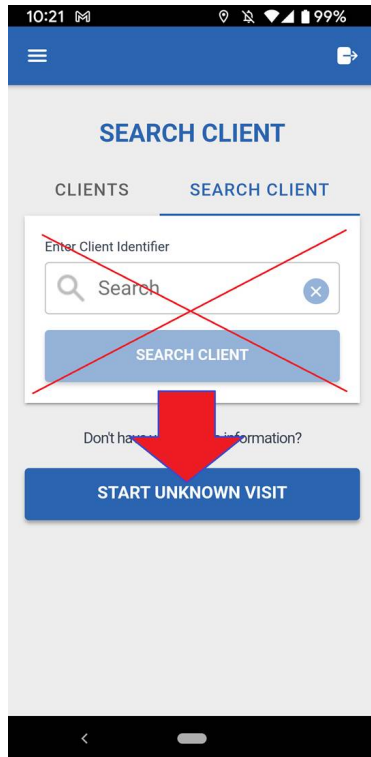
a. After signing in, click on the menu icon



b. Click on "Clients"



c. Client Search is not available on SMC, click "Start Unknown Visit"



- d. First Name and Last Name are required. Medicaid ID# is not required. Click “Start Visit”

