



ILLINOIS
DEPARTMENT OF HUMAN SERVICES
ELECTRONIC VISIT VERIFICATION (EVV)

Sandata Overview
For Agency
November 2013

- ◆ To give agencies general project background information
- ◆ To give agencies a high level overview of the EVV system.
- ◆ To provide information on upcoming training sessions

The SMART Act of 2012 requires the Department of Human Services to implement an “electronic service verification” system.

DHS has contracted with Sandata for an Electronic Visit Verification system. The EVV system is mandated for Agencies providing Homemaker and Home Healthcare services for Customers of the Home Services Program.

What is EVV?

EVV or Electronic Visit Verification is a telephone and computer-based system that electronically documents the precise time service delivery begins and ends.



The EVV system electronically documents:

- ◆ The identity of the Customer receiving services
- ◆ The agency worker's identity
- ◆ The date and time the agency worker begins and ends the delivery of services
- ◆ The location of service delivery

DHS Expectations of Agencies

- ◆ 100% participation
- ◆ Agency Preparation
 - Review the EVV information on the DHS website
 - Continue current procedures for obtaining Customer Approval/Certification
 - DHS will continue to audit for these federally required documents
 - Register and complete training
 - Prepare and train agency workers
 - Provide feedback

Agencies will have a variety of ways in which to receive formal Santrax training, including:

- ◆ Webinar Training
- ◆ Classroom Training

At least one Agency representative (no more than two) must attend an in person Classroom training session. Additional agency staff can attend webinar trainings.

EVV Telephone:

- ◆ Agency workers call at the beginning and end of each individual visit.
- ◆ Agency workers use the Customer's home telephone, cell phone, government-issued phone for the EVV process.
- ◆ Agency-specific toll-free numbers are provided.
- ◆ Instructions and reference materials are provided.

EVV Computer System (Santrax):

- ◆ Access via the web - from any location
- ◆ HIPAA compliant data management
- ◆ Real-time capture of telephony data
- ◆ Real-time monitoring
- ◆ Robust reporting
- ◆ Can resolve visit issues or errors immediately
- ◆ Data to support claims submission

- ◆ Each Agency is assigned a unique Santrax account number, and a customized Santrax EVV Call Reference Guide.
- ◆ Sandata provides your agency with two toll-free English numbers and one Spanish number to ensure continuous service.
- ◆ Your EVV Call Reference Guide will be provided after you complete required training.



santrax[®]
ELECTRONIC VISIT VERIFICATION™

Call Reference Guide:
IL-DHS

Agency Account Number: STX IL-DHS

Write your Santrax ID number above for easy reference.

Dial:
1-###-####
Or
1-###-####

Features:
Speaker Verification – Emp. Fixed Visit Verification – No
Tasks

Calling Instructions

STX IL-DHS

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 an English toll-free line, speak slowly and clearly one digit at a time (1075 = one, zero, seven, five).

- 

Dial any of the toll-free numbers assigned to your agency.



Santrax will say: **"Welcome, please enter your Santrax ID."**

If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.
- 

Press the numbers of your Santrax ID on the touch tone phone.



If you are calling from one of your English toll-free lines, you also have the option to speak your Santrax ID in English, slowly and clearly one digit at a time.



Santrax will say: **"To verify your identity, please repeat: At Santrax, my voice is my password"**

NOTE: *If you have not been enrolled in Speaker Verification, Santrax will skip this prompt. If this is the case, skip step 3, and then continue.*
- 

Say "At Santrax, my voice is my password"

The Santrax system may ask you to repeat the phrase several times before verifying your identity.



Santrax will say: **"Received at (TIME). If this is a Fixed Visit Verification visit using the FVV device, press the star (*) key to enter the visit verification numbers. Otherwise, press the pound (#) key to continue."**

If this is an FVV Call, press the star () key and refer to the FVV Call Reference Guide for detailed instruction for the FVV call process. If this is not an FVV call, press pound (#) and continue.*
- 

Press the pound (#) key to continue.



Santrax will say: **"Thank you, bye."**
- 

Hang up.

Calling Instructions

STX IL-DHS

Calling Out: When leaving the client's home, make sure you have the following information:

- Your Santrax ID.

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

- 

Dial any of the toll-free numbers assigned to your agency.



Santrax will say: **"Welcome, please enter your Santrax ID."**

If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.
- 

Press the numbers of your Santrax ID on the touch tone phone.



If you are calling from one of your English toll-free lines, you also have the option to speak your Santrax ID in English, slowly and clearly one digit at a time.



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- 

Press the pound (#) key to continue.



Santrax will say: **"Thank you, bye."**
- 

Hang up.

1. Upon arriving at the Customer's home, the agency worker calls the Santrax toll-free phone number
2. The agency worker enters their Santrax ID using the phone's keypad
3. The agency worker speaks their recorded voiceprint phrase
4. The agency worker will hear a confirmation of the time the call was received and hang up.



What if a Customer receives *all* services in the home, but:

- ◆ Customer does not have:
 - home telephone
 - Cell phone
- ◆ Customer does not allow the agency worker to use the phone?

Solution:

- ◆ The Customer can request a Fixed Visit Verification (FVV) device.
- ◆ The device allows the agency worker to use the EVV system without using the telephone.



FVV Devices:

- ◆ Provide the date and time for the visit
- ◆ Make sure the correct individual received services

How:

- ◆ The agency worker presses a button on the device at the beginning and end of the visit
- ◆ The device displays a six digit number
- ◆ The agency worker writes down the numbers
- ◆ 15 minutes after the visit, the Provider may call into the EVV system and enters the numbers

The EVV system turns the number into a date and time.

- ◆ System accessed via web at: www.sandata.com
- ◆ Agencies will receive login credentials to access their EVV account after completing training.



Date Range	Reports	Start Dashboard	New Visit Maintenance	Fixed Visit Verification ("FVV")	Data Entry	Authorization	Santrax Documentation
Security							

Sort Options:

Visit Maintenance Report

Visit Maint Exceptions

Visit Maintenance Activity Report

- PDF Format
 ASCII Format



Last transfer files received:
 Last transfer files processed:
 Last reject files processed:

Select for:

Supervisor

Client

Dept/Tasks

Employee

From Time: 00 : 00 **From Date:** 10 / 7 / 2013
To Time: 14 : 54 **To Date:** 10 / 21 / 2013



- ◆ Santrax contains a variety of informative viewable, printable and searchable PDF reports specific to call and visit information.
- ◆ Daily Reports help manage the current day's visits or review call information for a previous day.
- ◆ Date Range Reports provide the ability to view data for a range of dates.
- ◆ Understanding the information contained in these reports will also facilitate making corrections in Visit Maintenance.
- ◆ Remember, obtain customer certifications and retain for DHS audit purposes.

Date Range	Reports	Start Dashboard	New Visit Maintenance	Fixed Visit Verification ("FVV")	Data Entry	Authorization	Plan of Care	Santrax Documentation	
Security									

Santrax v7.12

Select Report	Select Parameters
<p>Report Type</p> <p>Daily Reports</p>	<p>Contract</p> <p>All</p>
<p>Report Name</p> <p>Daily Call Listing</p>	<p>Program</p> <p>All</p>
	<p>Service</p> <p>All</p>
	<p>Client</p> <p>All</p>
	<p>Client AR#</p> <p>All</p>
	<p>Supervisor</p> <p></p>
	<p>Department</p> <p>All</p>
	<p>Employee</p> <p>All</p>
	<p>Order Sequence</p> <p></p>

Select Timeframe
<p>From</p> <p>10/20/2013 00:00</p>
<p>To</p> <p>10/20/2013 23:59</p>

Run Report

Last transfer files received
None

Last transfer files processed
None

Last reject files processed
None

Exit



Daily Call Listing	This report shows all calls that were made to agency's Santrax toll-free numbers for the date and time range specified.
No Show	The report shows agency workers that have not yet called for their scheduled assignments.
Unknown Client	If an agency worker calls into Santrax from a phone number that is not registered to any customer, the phone number is displayed instead of customer's name.
Unknown Employee	If an agency worker enters a Santrax ID that does not match with any known agency worker in Santrax or they do not enter any ID, that call will appear as an unknown employee.

Access Santrax Date Range Reports

Date Range | Reports | Start Dashboard | New Visit Maintenance | Fixed Visit Verification ("FVV") | Data Entry | Authorization | Santrax Documentation

Security

Sort Options:

Visit Maintenance Report

Visit Maint Exceptions

Visit Maintenance Activity Report

Select All Clear All

PDF Format
 ASCII Format

OK Exit



Last transfer files received:
 Last transfer files processed:
 Last reject files processed:

Select for:

Supervisor

Client

Dept/Tasks

Employee

Select by Contract

Select by Exception

From Time: 00 : 00 **From Date:** 10 / 7 / 2013
To Time: 14 : 54 **To Date:** 10 / 21 / 2013



This Date Range page lists all available reports that will reflect activity in the system for the specified period of time

<p>Weekly Call Summary</p>	<p>Compares, for a seven-day period, the total scheduled hours against the actual hours serviced. If there is a difference between the total scheduled and the total actual, the difference will appear in the 'Diff' column at the right.</p>
<p>Payroll Summary (Customer)</p>	<p>Listing of every visit the Customer received within the selected date range. The report includes complete and incomplete visits and lists the date of the visit, the employee and total hours of each visit.</p>
<p>Payroll Summary (Employee)</p>	<p>Listing of every Customer the employee serviced within the selected date range. The report includes complete and incomplete visits and lists the date of the visit, the individual and total hours of each visit.</p>
<p>Visit Maintenance Exceptions Report</p>	<p>Report details the various exceptions found in the Visit Maintenance module and lists each exception type page by page.</p>
<p>Visit Maintenance Report</p>	<p>This report lists all visits – both good visits and exception visits for the selected date range.</p>

- ◆ Visit Maintenance allows administrative users to view and edit EVV and FVV visits, as appropriate.
- ◆ Exceptions (i.e. missing call data) are highlighted in red on Visit Maintenance screen.
- ◆ Agencies can quickly and easily make corrections online so that visits can be reconciled.



 Exception Types
 All Exceptions
 All Visits

 From 
 To 

 Client

 Category

Employee

 DEP

 Contract

Visit Maintenance
Tue Oct 1 1:48:46

Total Visits: 284

SPV	Client	Employee	View	Date	Sch Start	Sch End	Sch Hrs	Call Start	Call End	Act Hrs	Pay Hrs	Memo	M/C	C	Task	Exp	No Exp
	Anderson, Andrew	Gutierrez, Linda		Mon 01/02	08:00	10:00	02:00					<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Anderson, Andrew	Gutierrez, Linda		Tue 01/03				10:38	12:41	02:03	02:00	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Anderson, Andrew	Gutierrez, Linda		Wed 01/04	08:00	10:00	02:00					<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input checked="" type="checkbox"/>	Andrews, Wade	Johnson, Curtis	<input checked="" type="checkbox"/>	Mon 01/02	09:00	12:00	03:00	<input checked="" type="checkbox"/> 09:09	<input checked="" type="checkbox"/> 12:03	02:54	03:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input checked="" type="checkbox"/>	Andrews, Wade	Johnson, Curtis	<input checked="" type="checkbox"/>	Wed 01/04	09:00	12:00	03:00	<input checked="" type="checkbox"/> 08:58	<input checked="" type="checkbox"/> 12:04	03:06	03:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input checked="" type="checkbox"/>	Andrews, Wade	Johnson, Curtis	<input checked="" type="checkbox"/>	Fri 01/06	09:00	11:30	02:30	<input checked="" type="checkbox"/> 09:01				<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
<input checked="" type="checkbox"/>	Andrews, Wade	009-90-8822	<input checked="" type="checkbox"/>	Fri 01/06				<input checked="" type="checkbox"/> 11:29				<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Armstrong, Freddie	Germaine, Justin		Mon 01/02	11:15	13:15	02:00	11:20	13:15	01:55	02:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Armstrong, Freddie	Germaine, Justin		Tue 01/03	11:15	13:15	02:00	11:08	13:15	02:07	02:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Armstrong, Freddie	Germaine, Justin		Wed 01/04	11:15	13:15	02:00	11:12	13:15	02:03	02:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Armstrong, Freddie	Germaine, Justin		Thu 01/05	11:15	13:45	02:30					<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Armstrong, Freddie	Germaine, Justin		Fri 01/06	11:15	13:15	02:00					<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Berry, Darryl	Hall, Sherry		Mon 01/02	11:00	14:00	03:00	10:34	12:29	01:55	02:00	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Berry, Darryl	Hall, Sherry		Wed 01/04	11:15	14:15	03:00	10:40	12:26	01:46	01:45	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Berry, Darryl	Hall, Sherry		Fri 01/06				10:24	12:24	02:00	02:00	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Bishop, Piter	Conley, Babara		Mon 01/02	15:30	17:00	01:30	15:22	16:57	01:35	01:30	<input checked="" type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Bishop, Piter	Conley, Babara		Tue 01/03	15:30	17:00	01:30	15:25				<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Bishop, Piter	Conley, Babara		Wed 01/04	15:30	17:00	01:30					<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
	Bishop, Piter	Conley, Babara		Thu 01/05	15:30	17:00	01:30	15:21	16:51	01:30	01:30	<input checked="" type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>

- ◆ Identifying unknown Customer calls and merging them to the appropriate schedule.
- ◆ Identifying unknown agency worker calls and merging them to the appropriate schedule.
- ◆ Adjusting/confirming the Hours worked for a visit.

9/10/13 EVV Notification letters sent to Agencies

9/11/13 Sandata Implementation survey begins

11/12/13 Classroom Training begins (through 12/6/13)

12/17/13 Webinar Training begins (through 12/19/13)

1/1/14 EVV System mandated GO LIVE

Reminder: Account information and materials will be provided only after an Agency completes training.

**TRAINING DATES, LOCATIONS, TIMES and
REGISTRATION INSTRUCTIONS WILL BE POSTED
ON THE DHS EVV WEBSITE!**

<http://www.dhs.illinois.gov/evv/agency>

Targeted training audience:

- ◆ Owners/Administrator
- ◆ Staff Support (HR, Scheduling)
- ◆ Billing Support

Administrative staff at the Agency will need to train the agency workers in the field staff on the Telephony process.

- ◆ Ongoing FAQs will be posted on the DHS EVV website
- ◆ Locations, dates, times and registration instructions for the various trainings will be posted on the DHS EVV website.
- ◆ For EVV System or technical questions, call the toll-free Sandata Customer Care line at: 855-331-8191.

- ◆ Identify office staff that will be using the EVV System
- ◆ Register and complete training
- ◆ Educate your field staff on the telephony process
- ◆ Access the DHS EVV website for additional information:
<http://www.dhs.illinois.gov/evv/agency>

THANK YOU FOR YOUR TIME!

