



Santrax[®] Payer Management

Electronic Visit Verification™ Solutions

*Increasing the Capacity to Care
Improving the Process of Home Care*

PCA Workforce Council Special Meeting 2017 Employer Forum Electronic Visit Verification (EVV)

November 4, 2017



What Is EVV?

Electronic Visit Verification (EVV) is a telephonic, mobile, and computer-based system that documents the precise time and actions taken by caregivers in the home.

Why Implement EVV?

- The Centers for Medicare and Medicaid Services (CMS) established requirement for all states to use an EVV system, in accordance with the 21st Century CURES Act.
 - Personal Care Services must use EVV by January 1, 2019
 - Home Health Care Services must use EVV by January 1, 2023
 - Failure to meet these deadlines results in reduction of Federal Financial Participation for those services

21st Century CURES Act Requirements

An EVV system must identify:

- The type of service performed;
- The individual receiving the service;
- The date of the service;
- The location of service delivery;
- The individual providing the service; and
- The time the service begins and ends.

DSS Successfully Implemented EVV

DSS successfully implemented EVV beginning January 1, 2017 for waiver agency providers and April 3rd 2017 for home health providers.

Current DSS EVV Program Status:

- 304 provider agencies are using EVV system:
 - 240 CHC/ABI/PCA providers
 - 64 Home Health Providers

Future Consumer Direct EVV Solution

Caregivers: Use EVV technology at visit to create electronic timesheet by capturing time in/out (duration) and tasks.

Caregiver EVV Portal: Caregiver can review and edit their timesheets. (Not Approve)

Client EVV Portal: Client/Representative can review, edit, and approve EVV created timesheets for submission to payroll.

DSS Jurisdictional View

Jurisdictional Reporting
Quality Oversight and Management

Consumer Direct EVV

System/Data

System configured for Consumer Direct program with client and caregiver data.

Visit Verification

Caregivers use multiple verification methods to capture time worked.

Timesheet

Timesheet is created with EVV data and available for review by both client and caregiver.

Caregiver Portal

Caregiver can review and edit timesheet.

Client Portal

Client can review, edit, and approve timesheet for payment.

Future Consumer Direct EVV Solution

Fiscal Management Portal

The Santrax Fiscal Management Portal will provide Allied Community Resources the capability to view and edit visit data across the entire program

- Allied will have a real time view of all visit data
- Visits approved by the client/representative via the client portal do not need to be faxed or emailed to Allied

Santrax Electronic Visit Verification (EVV)

- ⚡ Mobile app, Telephony, Fixed Visit Verification Device
- ⚡ Caregiver 'checks in' at visit start
- ⚡ Caregiver 'checks out' and documents tasks



Mobile Visit Verification:
Triangulates location using GPS



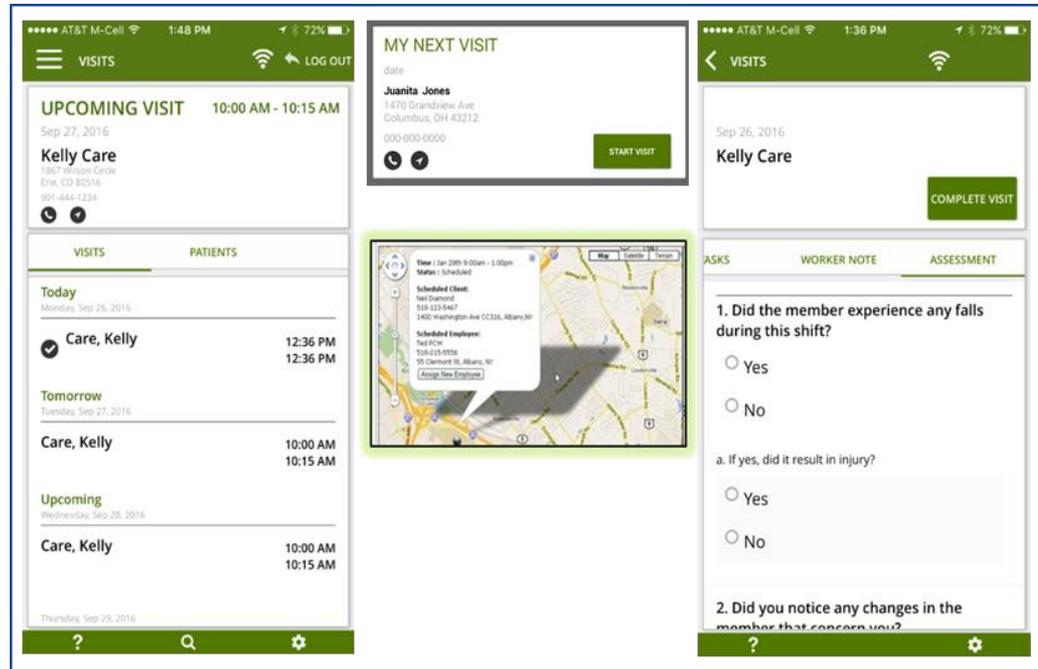
Client's line verification:
Uses ANI to match caller's phone number to provider account and caregiver location



Patented Fixed Visit Verification Device
Electronic random number match device

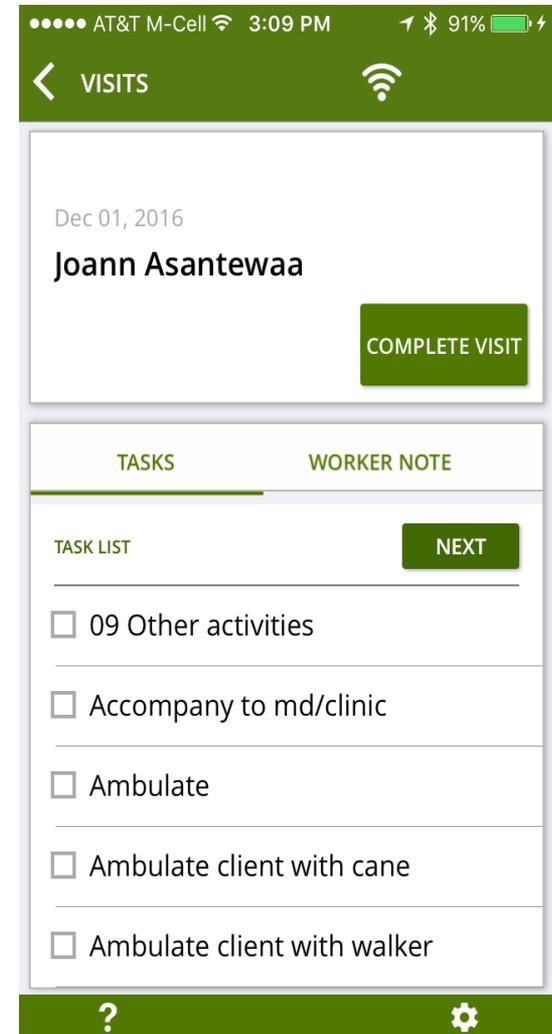
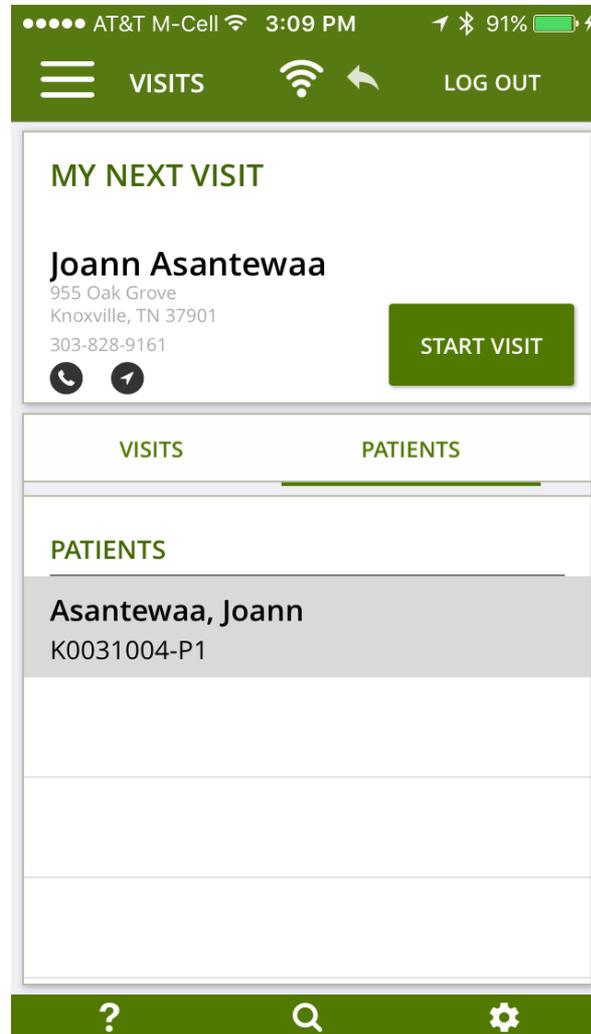
Mobile Visit Verification (MVV)

- Uses Caregiver Smart Device
- Application loaded on caregiver's 'smart' device (IOS and Android)—access via app store
- Sandata provides secure login credentials
- Can use Data plan or Wi-Fi
- Works in disconnected mode
- Captures Visit Check in and Check out—GPS captured at time of visit



Mobile Visit Verification (MVV)

- Find client on MVV and start visit
- At end of visit, tasks are collected
- Task data will also ID service code for Consumer Direct program
- Assumes no schedules



Telephony Consumer Direct EVV



Call Reference Guide

«COMPANY_NAME»

Agency Account Number: STX«ACCOUNT»

Write your Santrax ID number above for easy reference.

Dial:
1-«Primary_Phone»
Or
1-«Secondary_Phone»

Calling Instructions

STX«ACCOUNT»

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).



Dial any of the toll-free numbers assigned to your provider 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.
You also have the option to speak your Santrax ID in English, slowly and clearly one digit at a time.



When entered, Santrax will say: "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.*

3. Press the pound (#) key.



Santrax will say: "Please select "1" to call in or "2" to call out."

4. Press the 1 key to "Call In".



Santrax will say: "Received at (TIME). Enter number of tasks."

5. Hang up.

Calling Instructions

STX«ACCOUNT»

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

- Your Santrax ID.
- A list of tasks performed during the visit.

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).

6. Follow steps 1-3, and then continue.



Santrax will say: "Please select "1" to call in or "2" to call out."

7. Press the 2 key to "Call Out".



Santrax will say, "Received at (TIME). Enter number of tasks"

8. Press the total number of tasks performed for the client.



Santrax will say, "Enter task ID"

9. Press the Task Number you performed.

NOTES:

- Refer to your agency's task list.
- At this time, enter the task number for the **service** you provided.
- If you performed more than one task, wait for the system to confirm the task and then enter the next task number until you have entered all tasks performed during the visit.
- If you are performing a task with a reading, Santrax will pause after receiving the Task ID. During the pause, press the appropriate reading for this task using the amount of digits indicated on the task list.
- If you made a mistake entering Tasks, press "00", the system will confirm by saying: "Starting Over, Enter number of tasks". Enter all task ID's again.

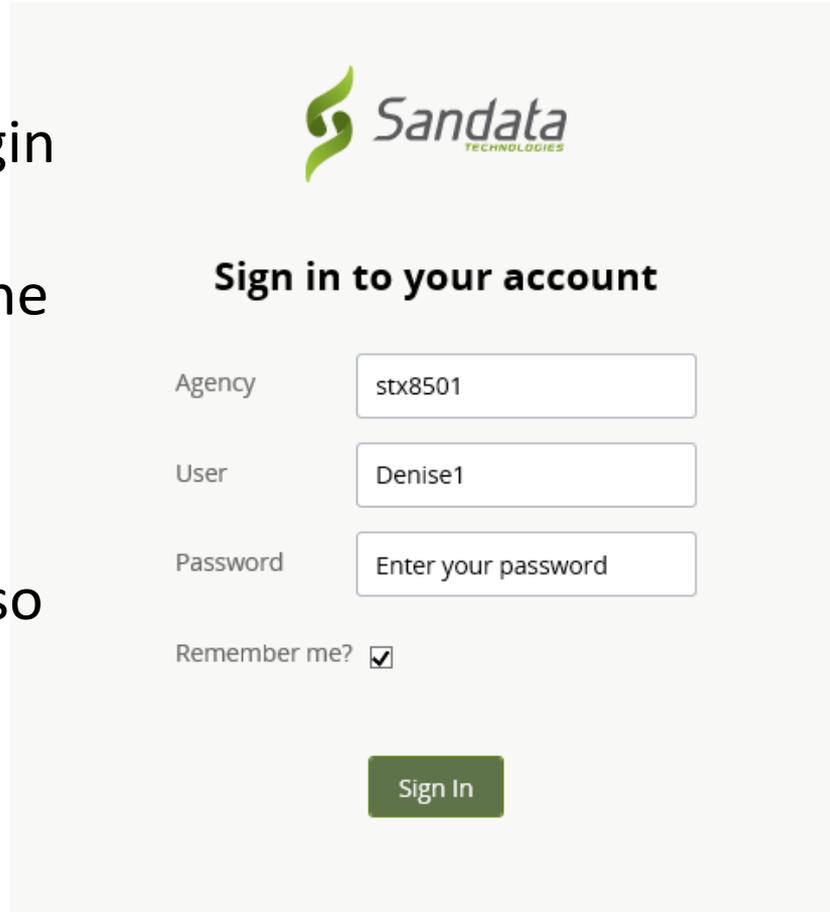


Santrax will say: "You entered (NUMBER) task(s). Thank you, bye."

10. Hang up.

Client EVV Portal/Caregiver EVV Portal

- Client/Caregiver Portal login via the web.
- Client portal is set up so the client can only see their specific employee visit activity.
- Caregiver portal is set up so the caregiver can only see their timesheets.
- ADA 508 compliant portal





Sign in to your account

Agency

User

Password

Remember me?

Client EVV Portal/Caregiver EVV Portal

- Caregivers/Employees check in/out in using Sandata Visit Verification which creates visit and timesheet information.
- The portal is populated with visit verification information for view/edit by caregiver and view/edit and approve by client.

The screenshot displays the 'Visits' section of the Sandata EVV Portal. At the top right, there are navigation links for 'Dashboard', 'Visits', and 'Reports'. Below the navigation, there are filters for 'Client' (Alterations, Evelyn (31045001)), 'Employee' (Abercrombie, Rose (11104500)), 'Service' (ALL SERVICES), and 'Pay Period' (07/01/2017 - 07/15/2017), along with an 'Approve' button. The main content is a table with the following columns: Date, Employee, Service, In, Out, Hrs., Status, and Actions. The table contains five rows of visit data.

Date	Employee	Service	In	Out	Hrs.	Status	Actions
Jul 01, 2017	Abercrombie, Rose	Certified Nursing Assistant	10:25 AM	11:27 AM	1.03	Approvable	[Edit] [X] [Approve]
Jul 01, 2017	Abercrombie, Rose	Personal Assistant	1:55 PM	3:00 PM	1.08	Approvable	[Edit] [X] [Approve]
Jul 01, 2017	Abercrombie, Rose	Registered Nurse	3:55 PM		0	Incomplete	[Edit] [X] [Approve]
Jul 02, 2017	Abercrombie, Rose	Certified Nursing Assistant	10:25 AM	11:27 AM	1.03	Approvable	[Edit] [X] [Approve]
Jul 02, 2017	Abercrombie, Rose	Personal Assistant	1:55 PM	3:00 PM	1.08	Approvable	[Edit] [X] [Approve]

Sample EVV Timesheet Output

Staff Timesheet

Date From 07/01/2016 Date To 07/07/2016

Staff:		Adams, Karen					Client:		Sandata, Test		
Staff Payroll ID:		000013558					Client ID:		4435		
Date	Service	Actual		Actual Total (Hrs)	Adjusted		Adjusted Total (Hrs)	Pay Hours	Tasks Performed	Status	Note
		In	Out		In	Out					
07/01/2016	T10192				07:00 am	11:00 am	4.00	0.00	General Housekeeping		
07/04/2016	T10192				07:00 am	11:00 am	4.00	0.00	Meal Preparation, General Housekeeping		
07/05/2016	T10192				07:00 am	11:00 am	4.00	0.00			
Totals:							8.00	0.00			

Client / Staff Certification for Services Rendered

Client :

Staff :

Date :

Date :