



Department of
Medicaid

EVV Stakeholder Advisory Group

January 27, 2021

EVV Staff Changes

EVV Program Manager

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Small EVV Stakeholder Groups

Improving Stakeholder Engagement

- ODM wants to ensure all stakeholders have a voice that is heard.
- ODM will continue quarterly meetings for full stakeholder group, monthly newsletters and webinars.
 - » <https://medicaid.ohio.gov/INITIATIVES/Electronic-Visit-Verification#1894219-newsletters>
 - » <https://medicaid.ohio.gov/Portals/0/Initiatives/EVV/Webinar-Tab.pdf>
- ODM is starting a series of small stakeholder groups focused on specific topics
 - » Co-led by ODM staff and a member of the stakeholder community
 - » Small size to allow more opportunity for discussion
 - » Initial meeting of each group in February 2021
 - » Identify short-term and long-term opportunities for improvement
 - » Each small group will report out at the full Stakeholder Advisory Group meeting in April 2021

Small Group Topics

- EVV and Individuals
- Home Health Therapies
- Alternate EVV Systems
- Support for Providers
- Technical Issues

Signing Up For Small Groups

- Groups will need to be approximately 10 people.
- Opportunity to sign up will be announced by email and posted on the EVV website.

Rule Review for 5160-1-40

Extending COVID Flexibilities

- OAC Rule 5160-1-40 (Electronic Visit Verification) was proposed in 2020 only to extend COVID flexibilities.
 - » Suspend voice and signature verification requirements
 - » Suspend requirement that new providers complete training prior to getting a Medicaid provider agreement.
- The rule will be effective on February 15, 2021.

Re-opening Rule

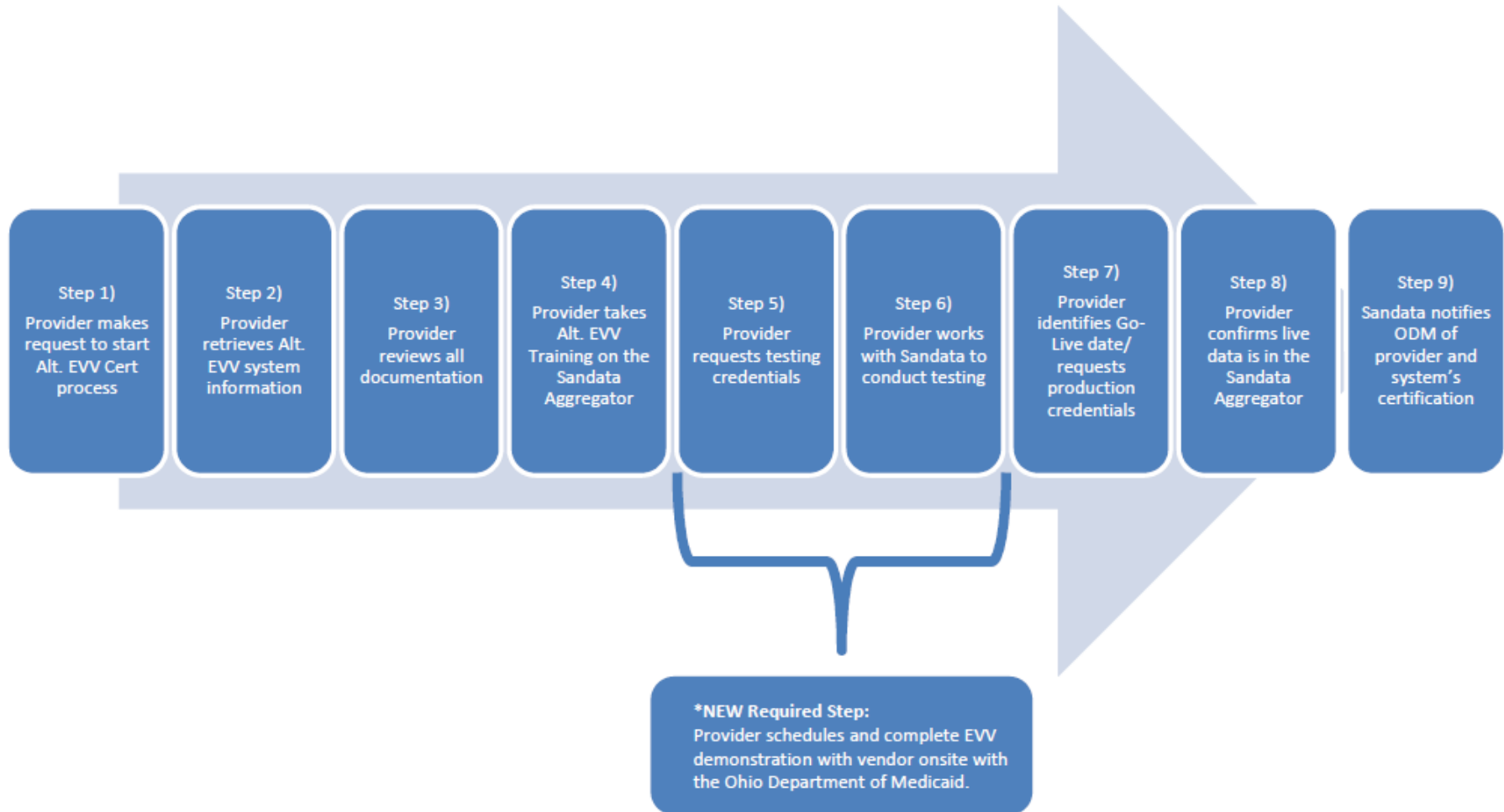
- ODM will be reopening the rule based upon stakeholder input. This will be a comprehensive rule review process that starts now.
- Rule work along with stakeholders will include addressing:
 - » Phase 3 changes
 - » Language changes requested in December Public Hearing
 - » Recommendations from small groups as appropriate
- Comments and suggestions can be sent now to EVVPolicy@medicaid.ohio.gov.
- Draft rule will be sent to stakeholders for comment prior to any filing.

Alternate EVV Systems

Alternate EVV System Overview

- An alternate EVV system is an EVV system that is not the ODM-provided solution through Sandata Technologies.
- Agency providers are eligible to use an alternate EVV system.
- To be an approved alternate EVV system, an agency provider must:
 - » Complete the alternate EVV Certification process, and
 - » Ensure the alternate EVV system meets ODM's Business Requirements, and
 - » Ensure the alternate EVV system meets ODM's Technical Specifications.
- Each Medicaid Provider ID using an alternate EVV system must complete the certification process.

Alternate EVV System Certification Process



Alternate EVV System Statistics

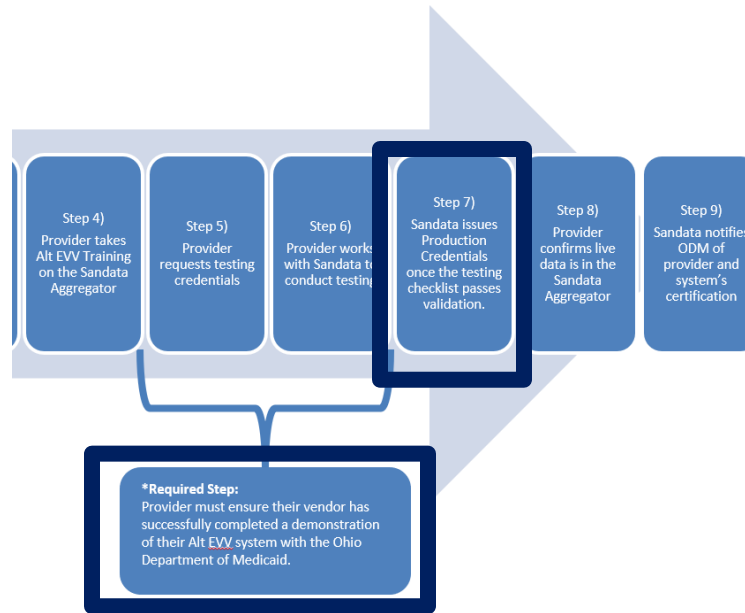
Below statistics provides a summary view of Alternate EVV Systems in Ohio as of 01/2021:

| Total Alt EVV Systems That: | |
|---|--------------|
| Passed Certification | 41 systems |
| In Testing Phase | 13 systems |
| Total | 52 systems |
| Total Agency Providers That: | |
| Are using an Alt EVV system | 477 agencies |
| Have an outstanding Part 2 of <i>Request to Schedule Demonstration Form</i> | 76 agencies |

Note: Values above represent unique vendors/providers.

Alternate EVV System Response to Feedback

- During Alt System demonstration meetings with ODM, Sandata will not be in attendance.
- Production credentials will be provided to vendors who have passed testing immediately, rather than waiting for credentials to be requested from vendor.
- Changes above went into effect 01/19/2021



Ohio Department of Aging Updates

ODA and EVV

- Phase 3 provider mailing via post office
 - Sent to all participant directed providers
 - Provided training registration information and quick reference guide
 - Sent last week of December 2020

ODA and EVV

- Comparing Master Provider ID with PIMS Provider ID
 - Identifying providers with multiple Medicaid numbers
- Communications
 - Targeted plan to include providers that have not completed training and providers that have completed training but are not using EVV

ODA and EVV

- Email updates with PAA's
 - Work with each PAA to update our email contact list
- Remittance Advice
 - In coming months will add detailed error codes

ODA and EVV

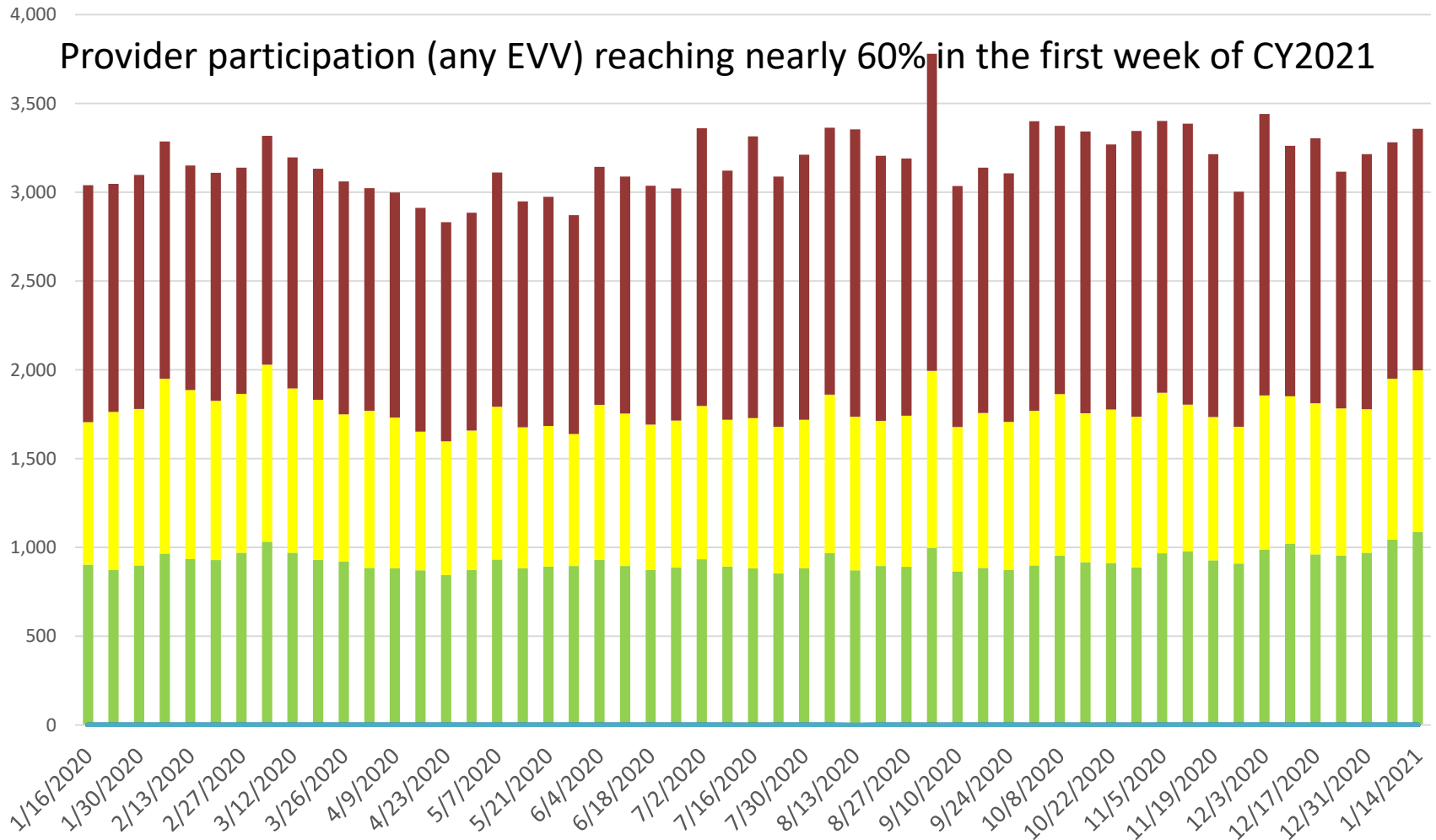
- Contact us:
 - Provider_Inquiry@age.ohio.gov

Ohio Department of Developmental Disabilities Updates

Phase 3 Efforts Continue in COVID-19 Context

- Phase 3 Providers for DODD are the Participant-Directed HPC providers (Agency and Independent)
- Independent PD-HPC providers are paid through the Morning Sun organization
- DODD claims and call center teams and Morning Sun are guiding providers with EVV questions to ODM's EVV mailbox, Sandata hotline
- DODD continues to waive EVV training prior to obtaining a Medicaid provider number, reflecting ODM's EVV policies during the ongoing State of Emergency

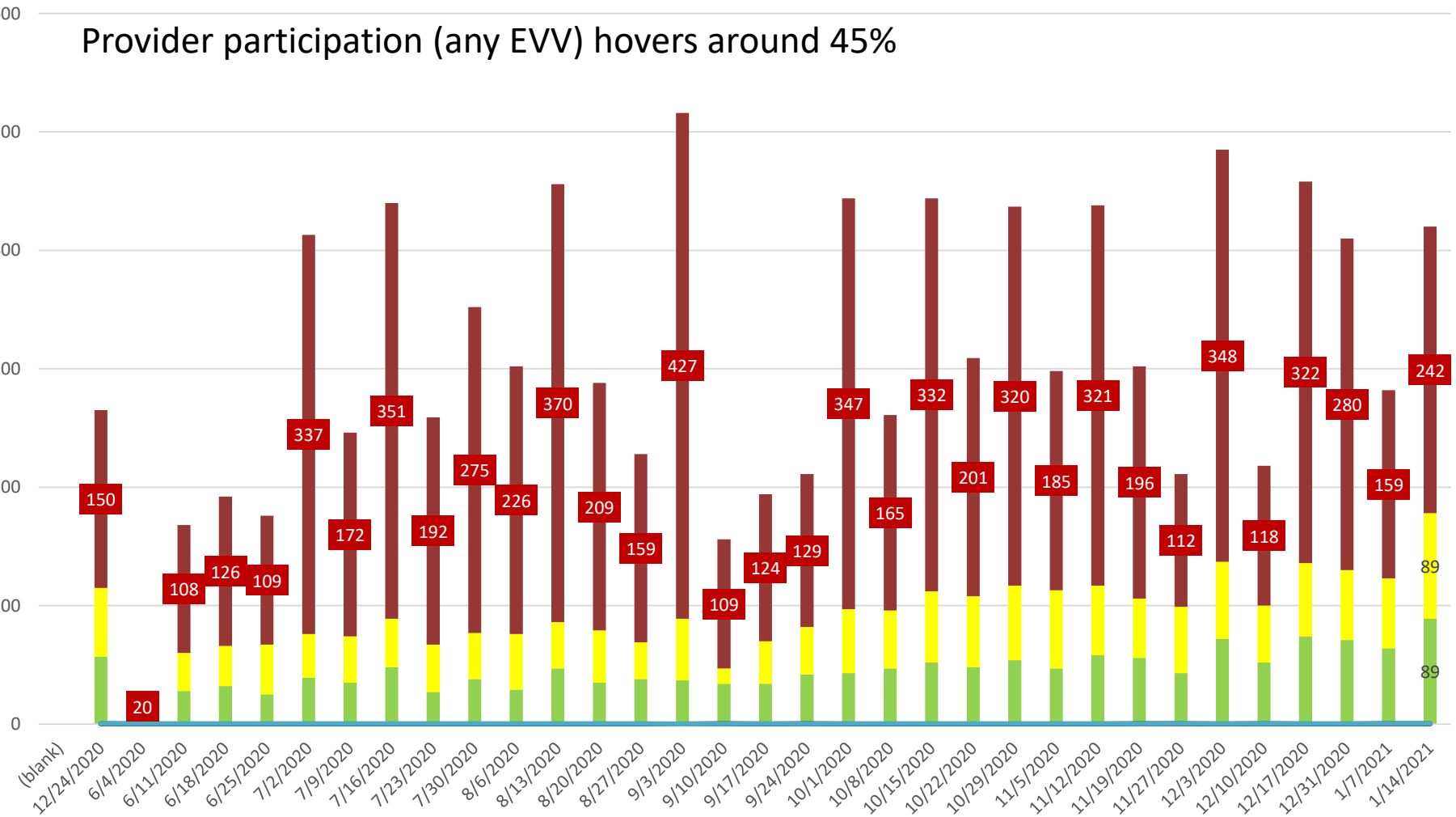
DODD Providers using EVV



Red- no EVV validation; Yellow- some EVV validation, Green- 100% EVV validation

DODD Providers using EVV (Phase 3 Only)

Provider participation (any EVV) hovers around 45%



Red- no EVV validation; Yellow- some EVV validation, Green- 100% EVV validation

Providers New During the Pandemic and Training

Training Flexibility Due to COVID Pandemic

- ODM and its partners suspended the requirement that training be completed prior to getting a Medicaid provider agreement during the pandemic.
- The public health emergency has been extended and the suspension of training requirements has been extended.
 - » This topic will be revisited during the rule review process with stakeholder input.
- Core training requirements must be completed before a provider can use EVV.
- This group of providers can complete training at any time so they can comply with EVV requirements.
 - » <https://medicaid.ohio.gov/INITIATIVES/Electronic-Visit-Verification/Training>
 - » ODM and its partners will reach out to impacted providers to make sure they are aware of need to use EVV and know how to access training.

Payment Reductions Update

Background

- The 21st Century Cures Act requires states to use Electronic Visit Verification (EVV for home health and personal care services
- The Ohio Department of Medicaid first used EVV in 2019.
- The final services required by the Cures Act were included in the program on January 1, 2021.

Plans for Payment Reductions

- During the October stakeholder meeting, ODM announced plans to reduce payment by 10% for claims not supported by EVV visits in Summer 2021.
- Many stakeholders expressed concerns about the impact this will have on providers and the individuals they serve.
- ODM has heard the concerns and taken action based on that clear input.
- In response to stakeholder concerns, ODM will delay payment reductions until January 2022 or later.

Provider 1:1 Assistance and Training Tools

Provider 1:1 Assistance

- ODM has been and continues to offer Provider 1:1 sessions with an EVV Trainer to assist providers
- Sessions are booked through an online calendar where a provider can see what dates/times are available and sign up for what works best for them
- Sessions are 30 minutes long, and if more time is needed it can be scheduled
- The EVV Trainer will review the provider's EVV account before the session so that they can provide personalized help on what the provider may need to know or work on
- Provider 1:1 assistance has been available since November 2020

Provider 1:1 Assistance Statistics

| Month | Number of Sessions Offered | Number of Sessions Booked | Number of Sessions Not Booked |
|----------|----------------------------|---------------------------|-------------------------------|
| November | 23 | 23 | 0 |
| December | 41 | 40 | 1 |
| January | 61 | 14 | 47 |

*There are session still available.

Training Tools

- <https://www.Medicaid.Ohio.Gov/EVV> has additional training resources posted under the Training section, including:
 - » Upcoming Webinars
 - » Training Registration Quick Reference Guides for providers who need to take EVV Training
 - » Training Manuals
 - » Additional Training Resources



Training Tools: Upcoming Webinars

- <https://www.Medicaid.Ohio.Gov/EVV> has additional training resources posted under the Training section
- January's focus has been on how to help providers be successful with EVV
- February's webinars will be posted soon and will be for Q&A

Upcoming Webinars

January webinars will focus on agencies and independent providers successfully using the EVV system. If you would like to attend, please use the links below to register. If you are unable to attend the live webinar, a recording of the webinar will be posted on the Webinar tab on the ODM website for your access.

| Date | Title | Time | Register |
|------------------|-------------------------|--------------------|--------------------------|
| January 22, 2021 | Be Successful with EVV! | 9:00 AM - 10:30 AM | Register |
| January 26, 2021 | Be Successful with EVV! | 3:00 PM - 4:30 PM | Register |
| January 29, 2021 | Be Successful with EVV! | 2:30 PM - 4:00 PM | Register |

Training Tools: Quick Reference Guides

- <https://www.Medicaid.Ohio.Gov/EVV> has additional training resources posted under the Training section
- Under the Additional Resources heading, you'll find a link to the Quick Reference Guides

Additional Training Resources

- Quick Reference Guides




EVV Quick Reference Guides

- [Acknowledge Exceptions](#)
- [Create a Client](#)
- [Create an Employee](#)
- [Create a User](#)
- [Missing Call In or Call Out](#)
- [Missing Service Exceptions](#)
- [Missing Visit – Creating a Manual Call](#)
- [Reactivating a Client](#)
- [Reactivating an Employee](#)
- [Running a Report](#)
- [Terminating a Client](#)
- [Terminating an Employee](#)
- [Unauthorized Service Exception](#)
- [Unknown Client Exception](#)
- [Unknown Employee Exception](#)

Training Tools: Quick Reference Guides

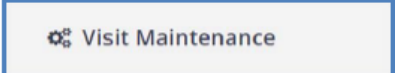
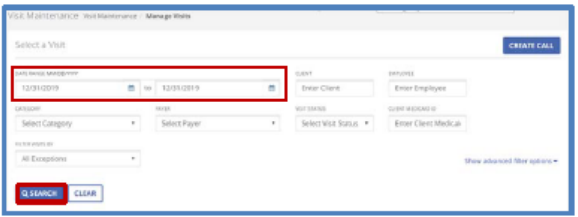
- <https://www.Medicaid.Ohio.Gov/EVV> has additional training resources posted under the Training section
- Under the Additional Resources heading, you'll find a link to the Quick Reference Guides
- Quick Reference Guides are short, step-by-step, how-to documents for using Sandata's EVV system



Quick Reference

Acknowledging Exceptions

Some exceptions need to be acknowledged in Visit Maintenance, for the visit to be verified.

| | |
|---|--|
| <p>Step 1</p> <ul style="list-style-type: none"> Click Visit Maintenance on the navigation panel. |  |
| <p>Step 2</p> <ul style="list-style-type: none"> Change the <i>DATE RANGE</i> to match the date of the visit. Click SEARCH. |  |

Training Tools: Sandata Self-Paced Training Video Library

Ohio Department of Medicaid - Sandata EVV for Agency Providers

This channel includes all of the features of how to use Sandata EVV, Sandata Mobile Connect, and Telephony.

Push PLAY to play all of these videos in succession, or scroll down to play videos individually.

▶ Play

Subscribe for updates

- Watch using the Agency or Non-Agency video library link
- Videos are shorter and cover each part of Sandata EVV, Sandata Mobile Connect, and Telephony

SANDATA MOBILE CONNECT



SMC Starting a Visit



SMC Initial Setup and Credentials



SMC Completing a Visit



SMC Completing a Visit with Client Audio Verification

Visit Capture Methods

EVV Visit Capture Overview

- There are three different ways agencies/non-agency providers are able to capture visits for Ohio EVV.
- Sandata Mobile Connect (or SMC)
- Telephony (TVV)
- Manual Entry
- Alternate EVV vendors are required to also provide three ways for visit capture in their own systems.

EVV Visit Capture - Sandata Mobile Connect

- SMC is the mobile visit verification app installed on a provided EVV Device or downloadable by the employee onto their own smartphone or tablet device.
- SMC allows an employee to start and complete a visit, capturing the necessary visit information.
- For the Ohio EVV Program, SMC is the primary and preferred method of visit capture.
- SMC is to be used at the time you are providing services.

EVV Visit Capture - Telephony

- TVV is available as an alternative to the mobile call-in/call-out process.
- TVV should be utilized in cases where SMC is not available.
- To use TVV, call the number on your Call Reference Guide (found in your Welcome Kit) and enter visit information using the number pad on your phone.
 - » Caregivers will need their Santrax ID and the Sandata Client ID to enter all the required information to use TVV.
- TVV is to be used at the time you are providing services.

EVV Visit Capture – Manual Entry

- The third way to enter a visit is manual visit entry in the Sandata online portal.
- If neither SMC nor TVV are available, the agency provider enters the visit manually in *Visit Maintenance*.
 - » This can be used if the caregiver forgets to enter a visit or if the other two ways to record a visit (SMC or TVV) are unavailable for any reason.
- Manual visits are created after the service is provided.

Full Visit Export Report

New Report: Full Visit Export

- A new report has been created, based on feedback from Sandata EVV Portal and Aggregator users
- Users shared that they would like an easy way to see all information for their visits in one place and across a range of service days
- There is a lot of information that could be shared about visits
 - » More information than would fit on the kind of report that you can run and see displayed in EVV, today
- To make all possible information available, the information will be generated in a file that will be exported and saved outside of EVV
- The new report is called the **Full Visit Export**

New Report: Full Visit Export

- There will be a new “Report Type” added called **Exports** in the Report-Type drop-down

The screenshot displays the Sandata EVV web application interface. On the left is a blue sidebar with navigation links: 'Navigate Modules', 'Dashboard', 'Visit Maintenance', 'Reports' (highlighted), 'Data Entry', 'Security', 'Messaging', and 'Online Manual'. The main content area has a header with 'Account: 25090 - TJACKSON@MAILIN'. Below this, the 'Reports' section is active, showing a 'Select Report' dropdown menu. The dropdown is open, listing 'Daily Reports', 'Select Report Type' (highlighted in blue), 'Billing', 'Daily Reports', and 'Date Range Reports'. Below the dropdown, there are fields for 'Select Timeframe', including 'FROM DATE MM/DD/YYYY' (set to 01/20/2021) and 'FROM TIME HH:MM AM/PM' (set to 12:00 AM).

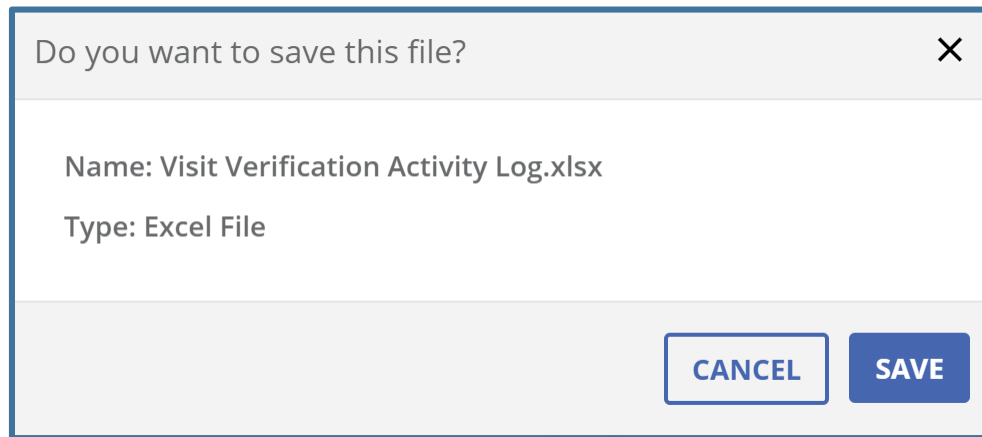
New Report: Full Visit Export

- You will see ***Full Visit Export*** under the *Report Name* dropdown, once the Report Type of Exports has been selected
- Once the Full Visit Export has been selected as the Report Name, you will see additional report filters appear at the bottom of the screen, including the option to select a date-range for the export
- You can choose a date-range of up to 31 days of visits to be shown in the export

The screenshot displays the 'Select Report' interface. On the left is a blue sidebar with the following menu items: 'Navigate Modules' (with a magnifying glass icon), 'Dashboard' (with a grid icon), 'Visit Maintenance' (with a gear icon), and 'Reports' (with a bar chart icon). The main content area has a header 'Select Report'. Below this header are two dropdown menus. The first is labeled 'REPORT TYPE' and has the text 'Select Report Type' with a downward arrow. The second is labeled 'REPORT NAME' and has the text 'Select Report Name' with a downward arrow. A blue highlight is visible under the 'Select Report Name' option in the second dropdown menu.

New Report: Full Visit Export

- When you are done setting the report filters, you would click *Run Report*.



- Like the Visit Verification Activity Log, you will not see a preview of the report show on the EVV screen.
- Instead, there will be a pop-up that will ask you to SAVE the export as an Excel file. Once saved, the exported report can be viewed in Excel.

New Report: Full Visit Export

Information that can be seen in the exported report includes:

- Basic information about the visit, such as the Account Number and Name that was logged under
- Visit Source
 - » This would be either Sandata or an Alternate EVV system listed
- The Payer, Program, and Service that were logged on the visit

| ACCOUNT_NUMBER | ACCOUNT_NAME | VISIT_SOURCE | PAYER | PROGRAM | SERVICE |
|----------------|--------------|--------------|---------|---------|-----------|
| 10011 | Test | SANDATA | ODM | SP | T1000 |
| 10011 | Test | SANDATA | DODD | PDHPC | HPC |
| 10011 | Test | SANDATA | Buckeye | MyCPD | T2025_MyC |
| 10011 | Test | SANDATA | ODA | PP | S5125_PP1 |

New Report: Full Visit Export

Information that can be seen in the exported report includes:

- The employee who logged the visit
 - » Employee Last Name
 - » Employee First Name
 - » Employee SSN
 - » Employee ID
 - » Employee Santrax ID

| EMPLOYEE_LAST_NAME | EMPLOYEE_FIRST_NAME | EMPLOYEE_SSN | EMPLOYEE_ID | EMPLOYEE_SANTRAX_ID |
|--------------------|---------------------|--------------|-------------|---------------------|
| Stanton | Violet | 047387896 | | 205853 |
| Ryan | Lucy | 197434567 | | 117954 |
| Lakin | Sabrina | 313138236 | | 109335 |
| Donnelly | Veronica | 365587120 | | 291663 |

New Report: Full Visit Export

Information that can be seen in the exported report includes:

- The client who received the service
 - » Client Last Name
 - » Client First Name
 - » Client Medicaid ID
 - » Client Alternate Medicaid ID
 - » Client Payer ID
 - » Sandata Client ID
 - » Alternate EVV Client ID
 - » Newborn Indicator (yes or no)

| ALT_EVV_CLIENT_ID | NEWBORN |
|-------------------|---------|
| | |
| | |
| | |
| | |

| CLIENT_LAST_NAME | CLIENT_FIRST_NAME | CLIENT_MEDICAID_ID | CLIENT_ALTERNATE_MEDICAID_ID | CLIENT_PAYER_ID | SANDATA_CLIENT_ID |
|------------------|-------------------|--------------------|------------------------------|-----------------|-------------------|
| Hoppe | Van | 103957380217 | | | 698260 |
| Boyer | Randy | 106584292560 | | | 565868 |
| Streich | Julian | 119314168449 | | | 147443 |
| Kuhlman | Leroy | 119815245746 | | | 357926 |

New Report: Full Visit Export

Information that can be seen in the exported report includes:

- Visit Status and Call In information for the visit
 - » In Call
 - » Call In Type
 - » Call In Phone
 - » Call In Latitude
 - » Call in Longitude

| VISIT_STATUS | IN_CALL | CALL_IN_TYPE | CALL_IN_PHONE | CALL_IN_LATITUDE | CALL_IN_LONGITUDE |
|--------------|------------------------|--------------|---------------|------------------|-------------------|
| Incomplete | 12/15/2020 12:00:00 AM | IVR | 9988887777 | | |
| Incomplete | 12/15/2020 12:00:00 AM | IVR | 9988887777 | | |
| Incomplete | 12/16/2020 12:00:00 AM | IVR | 9988887777 | | |
| Incomplete | 12/16/2020 12:00:00 AM | IVR | 9988887777 | | |

New Report: Full Visit Export

Information that can be seen in the exported report includes:

- Call Out information for the visit
 - » Out Call
 - » Call Out Type
 - » Call Out Phone
 - » Call Out Latitude
 - » Call Out Longitude

| OUT_CALL | CALL_OUT_TYPE | CALL_OUT_PHONE | CALL_OUT_LATITUDE | CALL_OUT_LONGITUDE |
|------------------------|---------------|----------------|-------------------|--------------------|
| 12/15/2020 12:00:00 AM | IVR | 9988887777 | | |
| 12/15/2020 12:00:00 AM | IVR | 9988887777 | | |
| 12/16/2020 12:00:00 AM | IVR | 9988887777 | | |
| 12/16/2020 12:00:00 AM | IVR | 9988887777 | | |

New Report: Full Visit Export

Information that can be seen in the exported report includes:

- Additional information about whether or not the visit times were adjusted
 - » Adjusted In Time
 - » Adjusted Out Time
 - » Actual Time
 - » Adjusted Time
- The ultimate Bill Time used to calculate units and the Units that were calculated for the visit
- Whether or not the visit is a Group Visit and, if so, the Group Visit Code

| ADJUSTED_IN_TIME | ADJUSTED_OUT_TIME | ACTUAL_TIME | ADJUSTED_TIME | BILL_TIME | UNITS | GROUP_VISIT | GROUP_VISIT_CODE |
|-----------------------|-----------------------|-------------|---------------|-----------|-------|-------------|------------------|
| | | | | | 1 | YES | 613940 |
| | | | | | 1 | NO | |
| | | | | | 1 | NO | |
| 12/30/2020 1:00:00 AM | 12/30/2020 1:05:00 AM | | 5 | 5 | 1 | NO | |

New Report: Full Visit Export

- Information that can be seen in the exported report includes:
- Whether or not a GPS Exception would have been triggered
 - » This is for informational purposes only to the user
 - GPS Call In and Call Out Distance
 - GPS Call Out Distance
 - Whether or not a Client Signature was captured and, if so, what type
 - Whether the client verified the time and service of the visit

| GPS_EXCEPTION | GPS_CALL_IN_DISTANCE | GPS_CALL_OUT_DISTANCE | CLIENT_SIGNATURE | CLIENT_SIGNATURE_TYPE | CLIENT_VERIFIED_TIME | CLIENT_VERIFIED_SERVICE |
|---------------|----------------------|-----------------------|------------------|-----------------------|----------------------|-------------------------|
| | | | NO | | NO | NO |
| | | | NO | | NO | NO |
| | | | NO | | NO | NO |
| | | | NO | | NO | NO |

New Report: Full Visit Export

Information that can be seen in the exported report includes:

- Exception information
 - » A “NO” indicates the exception does not exist for the visit
 - » A “YES” indicates the exception does exist for the visit

| UNKNOWN_CLIENT_EXCEPTION | UNKNOWN_EMPLOYEE_EXCEPTION | VISIT_WO_INCALL_EXCEPTION | VISIT_WO_OUTCALL_EXCEPTION | UNMATCHED_CLIENTID_PHONE_EXCP | MISSING_SERVICE_EXCEPTION | UNAUTHORIZED_SERVICE_EXCEPTION | VISIT_VERIFICATION_EXCEPTION |
|--------------------------|----------------------------|---------------------------|----------------------------|-------------------------------|---------------------------|--------------------------------|------------------------------|
| NO | NO | NO | YES | NO | NO | NO | YES |
| NO | NO | NO | YES | NO | NO | NO | YES |
| NO | NO | NO | YES | NO | NO | NO | YES |
| NO | NO | NO | YES | NO | NO | NO | YES |

New Report: Full Visit Export

Information that can be seen in the exported report includes:

- Whether or not the Client Signature Exception or Service Verification Exceptions existed for the visit (yes or no)
- The total original exceptions that existed for the visit
- The total unresolved or current exceptions that still remained on the visit
- The Provider ID that the visit is assigned to

| CLIENT_SIGNATURE_EXCEPTION | SERVICE_VERIFICATION_EXCEPTION | TOTAL_ORIGINAL_EXCEPTIONS | TOTAL_CURRENT_EXCEPTIONS | PROVIDER_ID |
|----------------------------|--------------------------------|---------------------------|--------------------------|-------------|
| YES | NO | 4 | 4 | 1001111 |
| YES | NO | 4 | 4 | 1001111 |
| YES | NO | 4 | 4 | 1001111 |
| YES | NO | 4 | 4 | 1001111 |

New Report: Full Visit Export

- The Full Visit Export will be available at the end of February
- It will be available in both the Sandata Aggregator and the EVV Portal