



WISCONSIN DEPARTMENT
of HEALTH SERVICES

Be sure to read
the speaker notes
below each slide.

Create Under 50 Hour Fee-for-Service Client in the Sandata Portal

Welcome to the training for Electronic Visit Verification Portal: Create an Under 50 Hour Fee-for-Service Client in the Sandata Portal.

The create fee-for-service client function is required **only** for fee-for-service members, also known as straight Medicaid members, receiving less than 50 hours of personal care service without a prior authorization.

Why Create a Fee-for-Service Client in the Sandata EVV Portal?

- Typically, clients are automatically entered into the Sandata Portal based on a Medicaid approved prior authorization.
- Fee-for-service clients receiving less than 50 hours of personal care per calendar year may not have a prior authorization.
- When there is no authorization, Sandata will not receive the client data from ForwardHealth.
- The provider agency must manually enter this client data in the Sandata Portal.

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

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Fee-for-Service clients that are receiving less than 50 hours of personal care per calendar year may not have an authorization.

If there is no authorization, Sandata will not receive the client data from ForwardHealth. Therefore, the client information will not populate to the provider's Sandata Portal.

The provider agency must manually create a fee-for-service client in the Sandata Portal. After this is done, workers will be able to more easily create a visit using the Sandata Mobile Connect app. The visits will also be able to get to "verified" status in the Sandata Portal.

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

Agenda

- Creating a Fee-for-Service Client in the Sandata Portal
 - Search for Existing Client File
 - Complete Personal Tab
 - Complete Program Tab
- Maintaining Information
- Resources

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

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The agenda for this training is:

Creating a Fee-for-Service Client in the Sandata Portal

Search for a pre-existing client file, to prevent duplicate information

Complete the personal tab

Complete the program tab

Maintaining Information

Resources and contact Information



WISCONSIN DEPARTMENT
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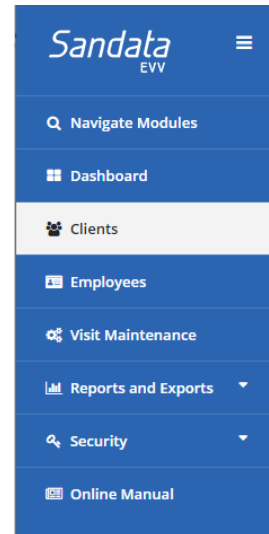
Creating a Fee-for-Service Client in Sandata EVV Portal

How to Create a Fee-for-Service Client in Sandata EVV Portal. This function is used only for certain (under 50 hours) fee-for-service clients.

Search for Existing Client File

- Log in to the Sandata EVV Portal.
- From the navigation panel, click **Clients** to access client records.
- The Client/Program search screen will be displayed.

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.



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Let's begin by making sure the client isn't already in the Sandata Portal. You can save yourself some work if the client is already entered.

First, log in to the Sandata EVV Portal.

From the navigation panel, click Clients to access client records.

The Client/Program search screen will be displayed.

Search for Existing Client File

- Search for the client.

Select a Client / Program As of: 12:26 PM CREATE FFS CLIENT

| | | | |
|--|----------------------------------|---------------------------|------------------------------|
| LAST NAME Medicaid | FIRST NAME Mary | STATUS Select Status | CLIENT ID Enter Client ID |
| CLIENT PAYER ID Enter Client Payer ID | MEDICAID ID Enter Medicaid ID | PROGRAM Select Program | LANGUAGE Select Language |
| PRIMARY PAYER Select Primary Payer | | | |

Q SEARCH CLEAR

There are no records matching the provided search criteria

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

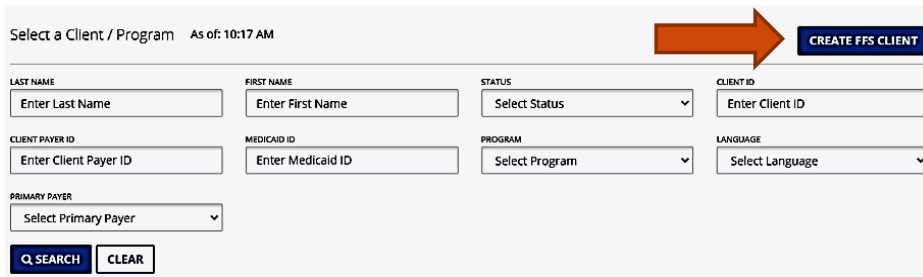
Search for the client by entering criteria in the data fields **or** simply select 'search' for an entire listing of all the agency's clients, past and present.

Always search first to be sure you're not creating a duplicate file. For example, if the client was served by your provider agency in the past, they would still be found in the client list and may only need updating. In our screen shot here you will see there are no records matching the search criteria.

Now we can be sure we won't have a duplicate client file.

Search for Existing Client File

- If the client is not found, click **Create FFS Client** button.



Select a Client / Program As of: 10:17 AM

CREATE FFS CLIENT

| | | | |
|--|----------------------------------|---------------------------|------------------------------|
| LAST NAME Enter Last Name | FIRST NAME Enter First Name | STATUS Select Status | CLIENT ID Enter Client ID |
| CLIENT PAYER ID Enter Client Payer ID | MEDICAID ID Enter Medicaid ID | PROGRAM Select Program | LANGUAGE Select Language |
| PRIMARY PAYER Select Primary Payer | | | |

Q SEARCH **CLEAR**

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

If the client is not found, use the Create FFS Client button in the upper right corner.

If the client is found, update their information as shown from slides 9 onwards.

Search for Existing Client File

- Enter required data indicated by an asterisk (*) and click **Create FFS Client**. The new client record is opened, and the **Personal** tab is displayed for additional data entry.

New FFS Client

* Indicates required field

| | |
|-----------------------------------|---|
| FIRST NAME* | LAST NAME* |
| <input type="text" value="Test"/> | <input type="text" value="Wisconsin"/> |
| PROGRAM* | MEDICAID ID* |
| <input type="text" value="FFS"/> | <input type="text" value="9999999997"/> |
| | PHONE |
| | <input type="text" value="() - -"/> |

CANCEL

CREATE FFS CLIENT



Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

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Enter required data indicated by an asterisk (*) and click Create FFS Client. The new fee-for-service client record is opened, and the personal tab is displayed for additional data entry.

To prevent issues in the future, make sure to double check that the Medicaid ID was entered correctly.

Complete Personal Tab

- Enter required data indicated by an asterisk (*).
- Skip grayed out fields as they are not editable.
- Enter information in the optional fields that makes sense for the agency's business.

The screenshot shows a web form with three tabs: 'Personal', 'Program*', and 'Diagnosis'. The 'Personal' tab is selected and highlighted with a red box. Below the tabs, the form is titled 'Personal' and includes a note: '* Indicates required field'. The form contains the following fields:

| Field | Value |
|-------------------------|---------------|
| TITLE | Select Title |
| FIRST NAME* | Test |
| MIDDLE INITIAL | |
| LAST NAME* | Wisconsin |
| SUFFIX | Select Suffix |
| SSN | XXX-XX-XXXX |
| GENDER* | Unknown |
| BIRTH DATE | mm/dd/yyyy |
| PRIMARY SPOKEN LANGUAGE | ENG- English |
| MEDICAID ID* | 9999999997 |
| CLIENT ID | 973167 |

At the bottom of the form is a blue button labeled 'REQUEST DEVICE'.

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

You can navigate through the fields by either tab key or clicking on the field. Required fields are indicated by an asterisk.

Skip grayed out fields as they are not editable.

There are many optional fields here. Only enter the ones that make sense for how your business will use the Sandata portal.

Complete Personal Tab

Enter the client's address:

- Address Type as "O – Other"
- Address Line 1
- Zip code
- City
- State

Addresses (1)

* indicates required field

| | | |
|-------------------------------|--------------|-----------------|
| 123 main O- Other (Current) ▾ | | ADD NEW ADDRESS |
| ADDRESS LINE 1* | 123 main | ADDRESS LINE 2 |
| ADDRESS TYPE* | O- Other ▾ | ADDRESS LABEL |
| ZIP CODE* | 53701-____ C | CITY* |
| COUNTY | Dane | STATE* |
| | | Wisconsin ▾ |

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

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Enter the client's address:

Address Type - To create a FFS client in Sandata, entering "Address Type" is required. **Entering as "O-Other" means it will not be overwritten if future authorizations arrive with a different address on file.**

Enter the valid client home address

Address Line 1

Zip code

City

State

All required fields have * on them.

Members should be encouraged to keep address information up to date with ForwardHealth. Clients can update their Medicaid information through the client's local income maintenance agency or tribe, online through the client's ACCESS account, or by using the Medicaid Change Report (F-10137). The client information made in the Sandata Portal will not flow backwards to update the Medicaid file.

Complete Personal Tab

- Enter landline or Voice over Internet Protocol (VoIP) phone numbers, if any, for EVV use with the client.

Phone Numbers, Etc

| | | | |
|-----------|---------|---------|---------|
| PHONE 1 * | PHONE 2 | PHONE 3 | PHONE 4 |
| () - - | () - - | () - - | () - - |

EMAIL ☒ ACTIVE

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

Only enter the client's landline home phone or voice over internet protocol (VoIP), such as phone service provided through a cable company, in the Phone field. **This should not be a cell phone number.** As you can see, there is no asterisk by the email. The email information is optional.

Complete Program Tab

- Click the **Program** tab.
- The next slides work through the boxes in the order shown:

The screenshot shows the 'Program' tab in a software interface. At the top, there are three tabs: 'Personal', 'Program*', and 'Diagnosis'. The 'Program*' tab is selected and highlighted with a red box. Below the tabs, the interface is divided into several sections. On the left, there is a 'Client Status' section with a dropdown menu set to 'Pending', an 'EFFECTIVE DATE' field with '04/20/2023', and a 'REASON FOR CHANGE' dropdown. Below this is a 'Program Details' section with a 'PROGRAM*' dropdown set to 'FFS' and a 'SUPERVISOR' dropdown set to 'Select Supervisor'. On the right, there is a 'Services *' section with an 'Add Service' button. Below that is a 'Payers' table with columns 'Rank', 'Payer', 'Medicaid ID', and 'Client Payer ID'. The table contains one row with Rank 1, Payer WIFFS, Medicaid ID 9999999997, and Client Payer ID 9999999997. At the bottom right, there is an 'Authorizations' section with checkboxes for 'Hide Expired Auths' and 'Hide Voided Auths'. Four orange arrows with numbers 1 through 4 indicate the sequence of steps: 1 points to the 'Client Status' dropdown, 2 points to the 'Services *' section, 3 points to the 'Program Details' section, and 4 points to the 'Authorizations' section.

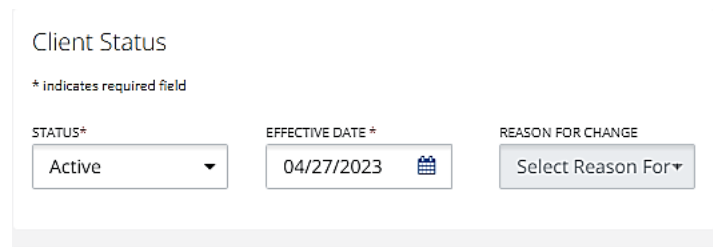
| Rank | Payer | Medicaid ID | Client Payer ID |
|------|-------|-------------|-----------------|
| 1 | WIFFS | 9999999997 | 9999999997 |

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

Information in the Program tab needs to be entered in a specific order for all the editing options to be available. The next slides will go in that order.

Complete Program Tab: Client Status

- Change the **Client Status** field from **Pending** to **Active**.
- The **Effective Date** field auto fills to the date the client record is created.



Client Status

* indicates required field

| STATUS* | EFFECTIVE DATE * | REASON FOR CHANGE |
|----------|------------------|---------------------|
| Active ▼ | 04/27/2023 📅 | Select Reason For ▼ |

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

Change the Client Status field from Pending to Active.

Clients are automatically loaded with a 'Pending' status. Changing to "Active" status will make all the editing options available.

(Usually, agencies do not have to change the client status, as having a client in a pending status does not affect the ability for a worker to record an EVV visit. But it may be to the agency's advantage to change all new clients to active, so when they see a pending client they are alerted that this is a new client with new authorization and/or a client authorization has been added.)

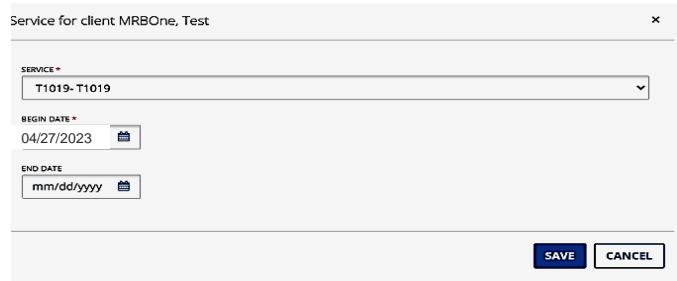
The Effective Date field defaults to the date the client record is created. The **Effective Date** is the date these client status changes are made.

Complete Program Tab: Services

- Click the + sign to add the service.
- Select the **Service** from the drop-down list and add a **Begin Date**.
- Click **Save**.



Services *



Service for client MRBOne, Test

SERVICE *

T1019- T1019

BEGIN DATE *

04/27/2023

END DATE

mm/dd/yyyy

SAVE CANCEL

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

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Click the plus sign to add the service.

Select the Service from the drop-down list, T1019. Only a T1019 fee-for-service client with less than 50 hours should be manually added to the Sandata Portal.

Add a Begin Date. A Begin Date is required. An End Date is optional on this screen.

Click Save.

Complete Program Tab: Program Details

- The **Created Date** can be backdated to accept earlier visits.
- The **Start of Care (SOC) Date** is the date services began. It can be backdated to match the **Created Date**.

Program Details

* Indicates required field

| | |
|------------------------|----------------------|
| PROGRAM* | SUPERVISOR |
| FFS- Fee For Service | Select Supervisor |
| ENROLLMENT DATE | CREATED DATE* |
| 01/01/2021 | 04/26/2023 |
| SOC DATE | EOC DATE |
| mm/dd/yyyy | mm/dd/yyyy |
| ELIGIBILITY BEGIN DATE | ELIGIBILITY END DATE |
| mm/dd/yyyy | mm/dd/yyyy |

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

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Enter a date in the Created Date and SOC Date (Start of Care) boxes.

An example of when these may need to be backdated is if the client file is created after EVV services have taken place. The agency will need to correct the SOC date to be able to clear exceptions from those earlier visits.

Complete Program Tab

- The Payers field will pop up. It will auto-populate with Wisconsin Fee-for-Service (WIFFS).



The screenshot displays a web interface for managing client information. It includes four main sections: Services, Payers, Authorizations, and Physicians. The Services section shows a table with columns for Code, Description, Start, and End, containing one entry for 'PERSONAL CARE SVC 15MIN'. The Payers section shows a table with columns for Rank, Payer, Medicaid ID, and Client Payer ID, containing one entry for 'WIFFS'. The Authorizations section has checkboxes for 'Hide Outdated Auths' and 'Hide Voided Auths'. The Physicians section has input fields for Primary, Secondary, Certifying, and Ordering, each with a search icon.

| Code | Description | Start | End |
|-------|-------------------------|---------|-----|
| T1019 | PERSONAL CARE SVC 15MIN | 11/5/20 | |

| Rank | Payer | Medicaid ID | Client Payer ID |
|------|-------|-------------|-----------------|
| 1 | WIFFS | 3332221111 | |

Authorizations

☒ Hide Outdated Auths ☒ Hide Voided Auths

Physicians

PRIMARY

SECONDARY

CERTIFYING

ORDERING

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

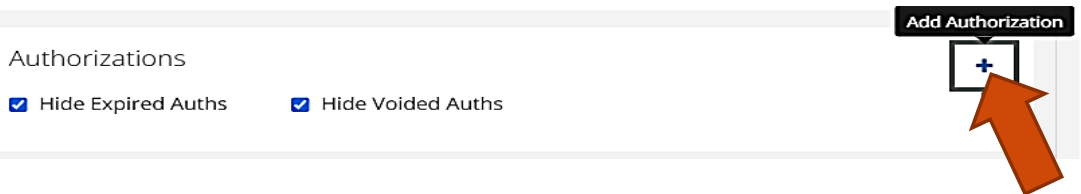
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The Payer field will auto-populate as Fee For Service. There is nothing else required on this portion of the screen.

Remember, all other clients will auto-populate within Sandata when their prior authorizations are automatically transferred to Sandata. Most clients will never need to be manually added to the Sandata Portal. The create fee-for-service client function is required **only** for fee-for-service members receiving less than 50 hours of personal care service without a prior authorization.

Complete Program Tab: Authorizations

- Click the + to add a manually created Sandata authorization file.



Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

This will bring you to the last required screen.

Complete Program Tab: Authorizations

- Change **Format** to hours.
- Set **Begin Date** to cover the service start date, backdating if needed.
- Set **End Date**.

Note: This process will not create an actual Medicaid approved prior authorization. This is only providing required information to Sandata.

Authorization Details

* Indicates required field

General Info

PAYER*
WIFFS

SERVICE*
T1019

EVENT CODE*
NONE- None

AUTHORIZATION NUMBER
AMP20230420XXXXXXXX

FORMAT*
Hours

☐ VOIDED

MAXIMUM
0 0 = Unlimited Used: 0

Date Range

BEGIN DATE * 04/03/2023
END DATE * 12/31/2023

AUTHORIZATION COMMENTS

FFS under 50 hours EVV Authorization

Set the end date far enough into the future to allow the “under 50 hours” visits to be accepted in the Sandata system. The end date can be any date up to 06/06/2079.

Maintaining Information

If a T1019 Fee-For-Service approved prior authorization is received in the future, Sandata will automatically end-date this manually created information. This prevents overlap of service information.

| Payers | | | |
|--------|-------|-------------|-----------------|
| Rank | Payer | Medicaid ID | Client Payer ID |
| 1 | WIFFS | 9999999997 | 9999999997 |

| Authorizations | | | | |
|---|---------------------------------------|--------|----------|--------|
| <input checked="" type="checkbox"/> Hide Expired Auths <input checked="" type="checkbox"/> Hide Voided Auths + | | | | |
| Service ^ | Authorization Number | Begin | End | Source |
| T1019- T1019 | AMP20230420T141908398 | 4/3/23 | 12/31/23 | WIFFS |

There is no new action required by the provider agency in this situation. It is automatically taken care of in the Sandata system.

Maintaining Information

If a T1019 authorization is approved *for different payer* in the future, the *provider* must end-date this manually created Sandata information. This prevents overlap of service information.

- Click on the Sandata authorization number.
- Change the end date.
- Save.

The screenshot shows the 'Authorizations' section of the Sandata system. It includes a table with columns for Service, Authorization Number, Begin, End, and Source. Below the table is a 'Date Range' form with 'BEGIN DATE' and 'END DATE' fields, and an 'AUTHORIZATION COMMENTS' section. An orange arrow points from the authorization number 'AMP20230420T141908398' in the table to the 'END DATE' field in the form.

| Service | Authorization Number | Begin | End | Source |
|--------------|-----------------------|--------|----------|--------|
| T1019- T1019 | AMP20230420T141908398 | 4/3/23 | 12/31/23 | WIFFS |

Date Range

BEGIN DATE * 04/03/2023

END DATE * 12/31/2023

AUTHORIZATION COMMENTS

FFS under 50 hours EVV Authorization

The Sandata system will NOT automatically end date the manually created Sandata information if a different payer (HMO, MCO) is assigned for T1019 services later on. In this case, the provider must take action and end date the manually created Sandata information.



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Resources

Know that we are here to help and provider agencies have many resources available.

Resources

- EVV Customer Care
 - 833-931-2035
 - VDXC.ContactEVV@wisconsin.gov
 - Monday-Friday, 7 a.m.-6 p.m.
- EVV training administrators webpage at <https://www.dhs.wisconsin.gov/evv/training-administrators.htm> has additional Client module information:
 - [PowerPoint 4: Client Format, P-02749](#)
 - [Wisconsin EVV Supplemental Guide, P-02745](#)



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Thank You