WISCONSIN DEPARTMENT of HEALTH SERVICES

Electronic Visit Verification Portal: Create Fee-for-Service Client

Agenda

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- Why Create a Fee-for-Service Client in the Sandata Portal
- How to Create a Fee-for-Service Client in the Sandata Portal
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How Client Information is Exchanged

How Client Information is Exchanged

1) Medicaid programs/payers submit their client authorization file to ForwardHealth daily.
2) ForwardHealth identifies EVV clients based on those authorizations.
3) ForwardHealth sends EVV client and authorization data to Sandata nightly.
4) Sandata creates the client in the Sandata Portal.

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

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

- 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.
- This requires the provider agency to manually create a fee-for-service client in the Sandata Portal.

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How to Create a Fee-for-Service Client in Sandata EVV Portal

How to Create a Fee-for-Service Client in the Sandata EVV Portal (1)

Sandata EVV Portal dates will default to the date the file was created.

Program Tab

- The **Effective Date** is the date client status changes are made.
- The **Created Date** is the date the client record was created.
- The **Start of Care (SOC) Date** is the date services began.

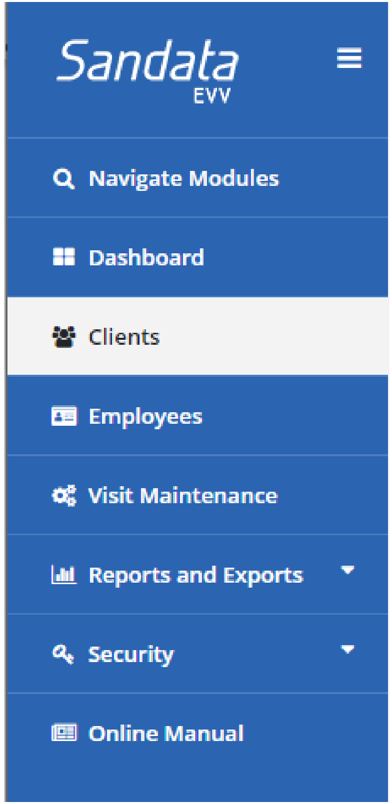
How to Create a Fee-for-Service Client in the Sandata EVV Portal (2)

Services Area

- The **Begin Date** is the date services started.
- The **End Date** is an optional field that should be left blank.

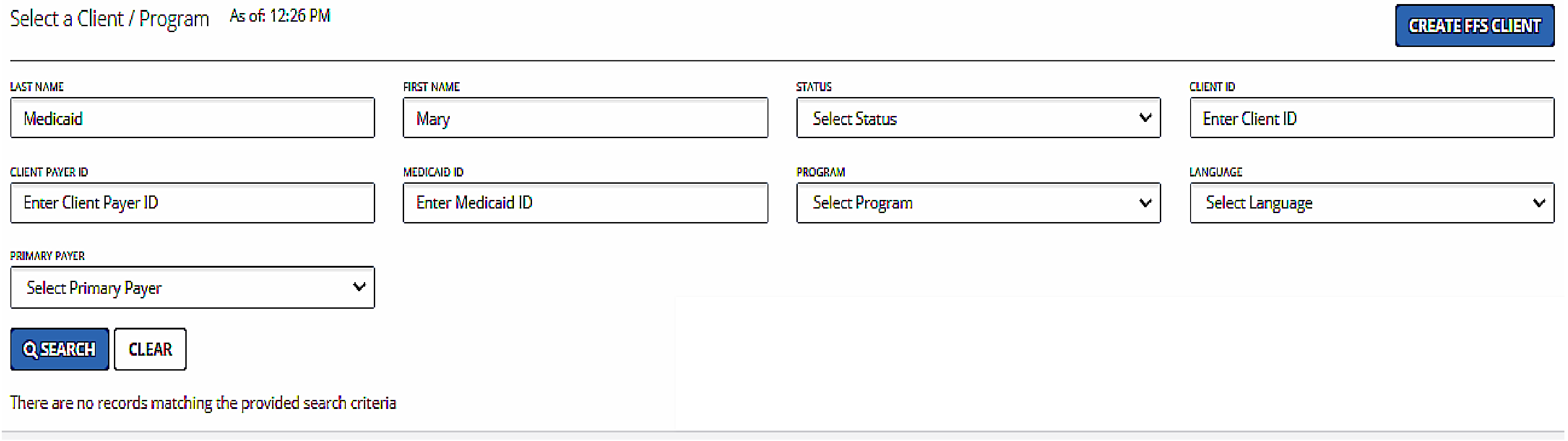
How to Create a Fee-for-Service Client in the Sandata EVV Portal (3)

- 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.



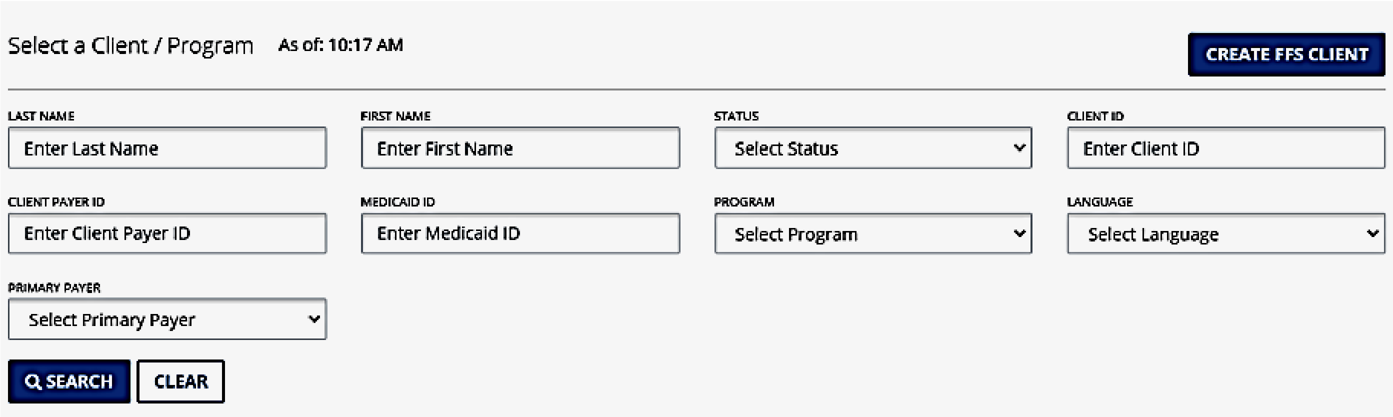
How to Create a Fee-for-Service Client in the Sandata EVV Portal (4)

- Search for client.



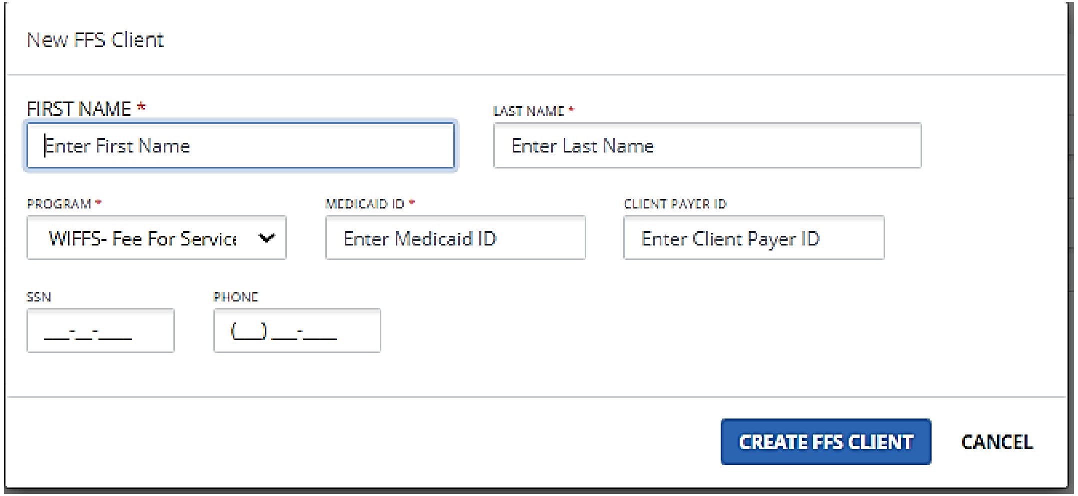
How to Create a Fee-for-Service Client in the Sandata EVV Portal (5)

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



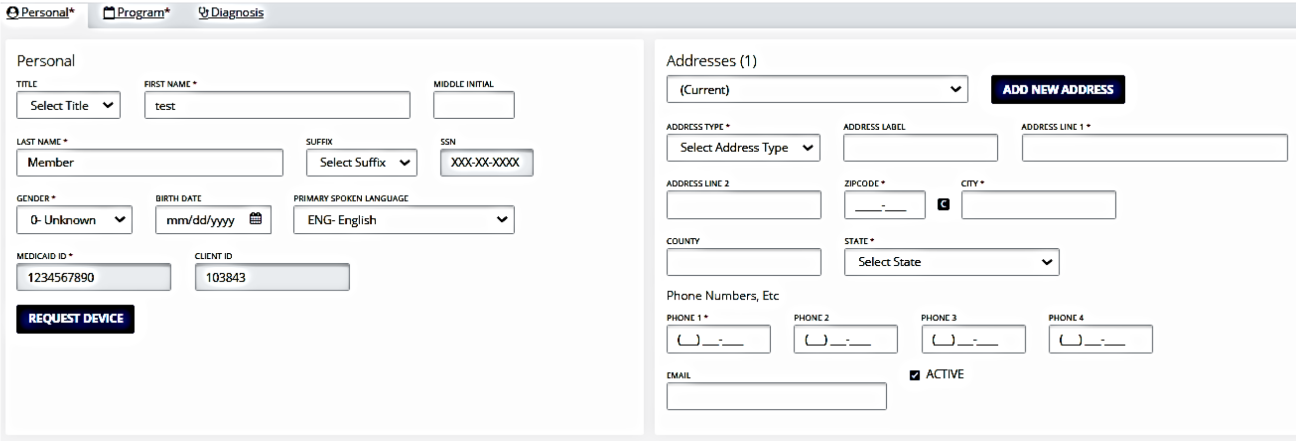
How to Create a Fee-for-Service Client in the Sandata EVV Portal (6)

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



Complete Personal Tab (1)

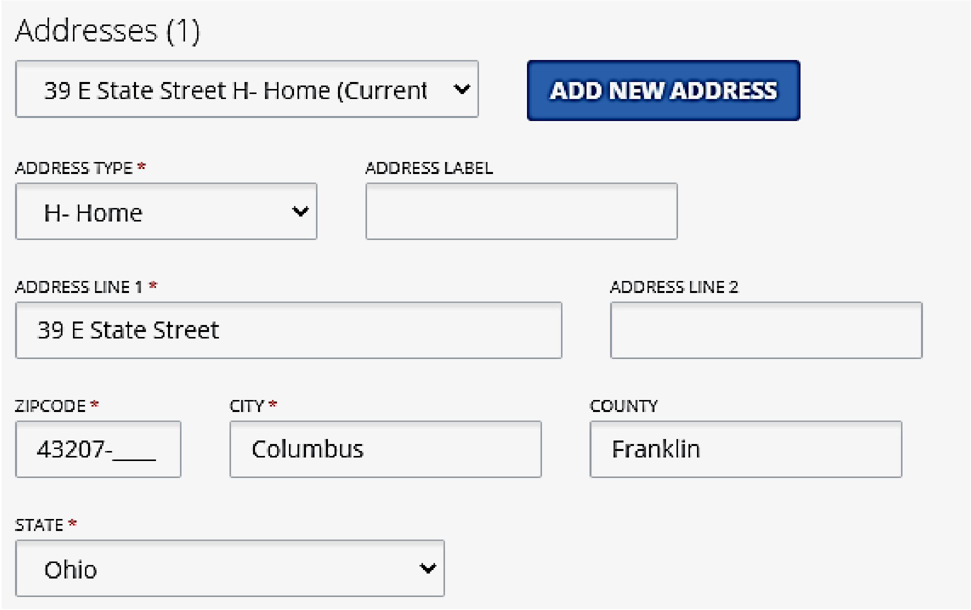
- Navigate through the fields and enter required data (*).
- Skip grayed out fields as they are not editable.
- Enter information in the optional fields that makes sense for the agency's business.



Complete Personal Tab (2)

Enter the client’s address:

- Address Type (Other)
- Address Line 1
- Zip code
- City
- State

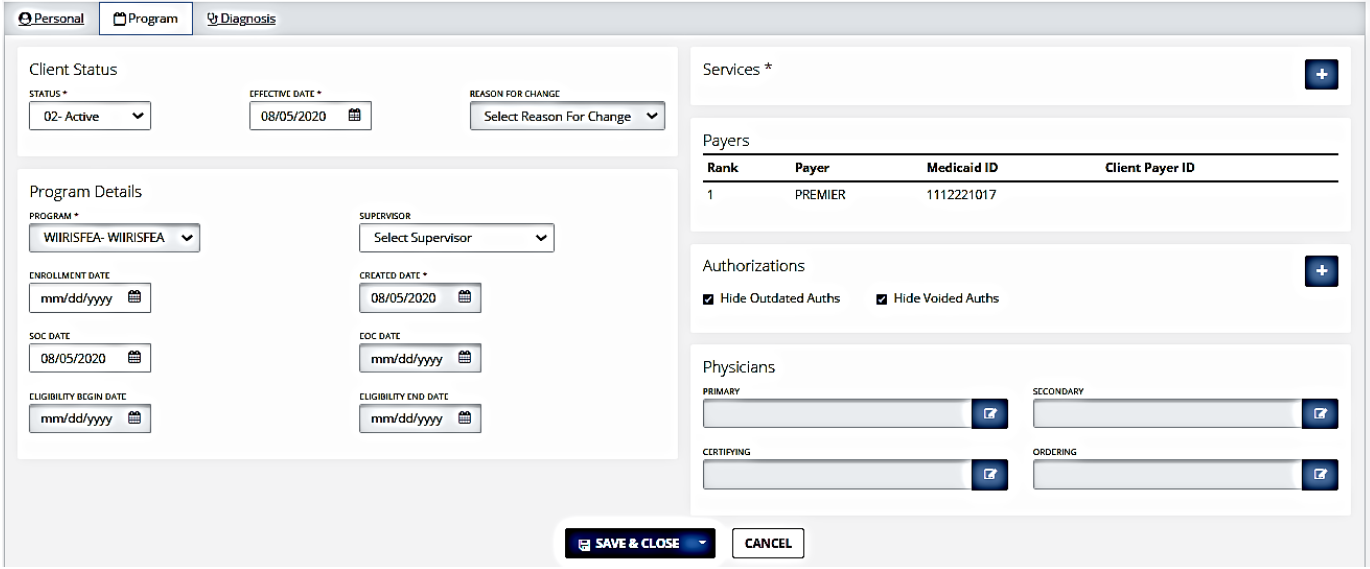


Complete Personal Tab (3)

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

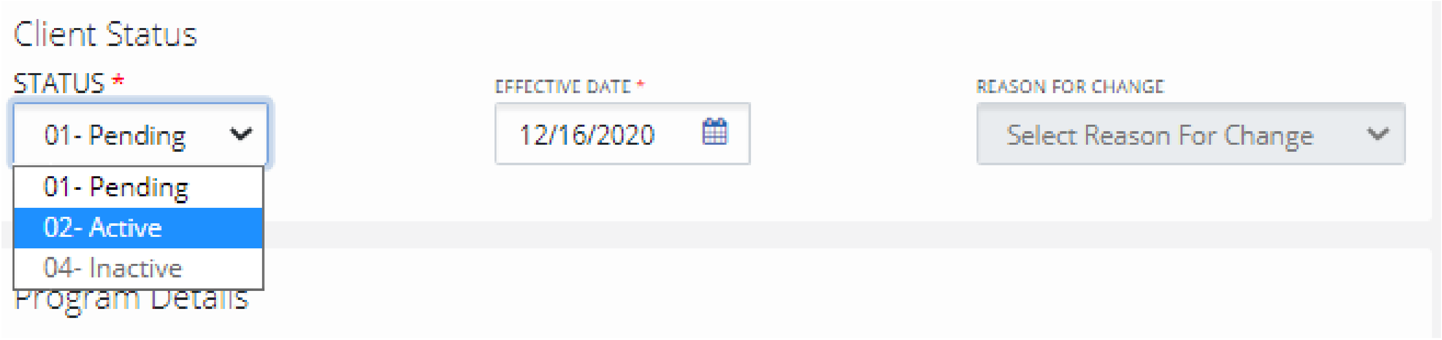
Complete Program Tab (1)

- Click the **Program** tab



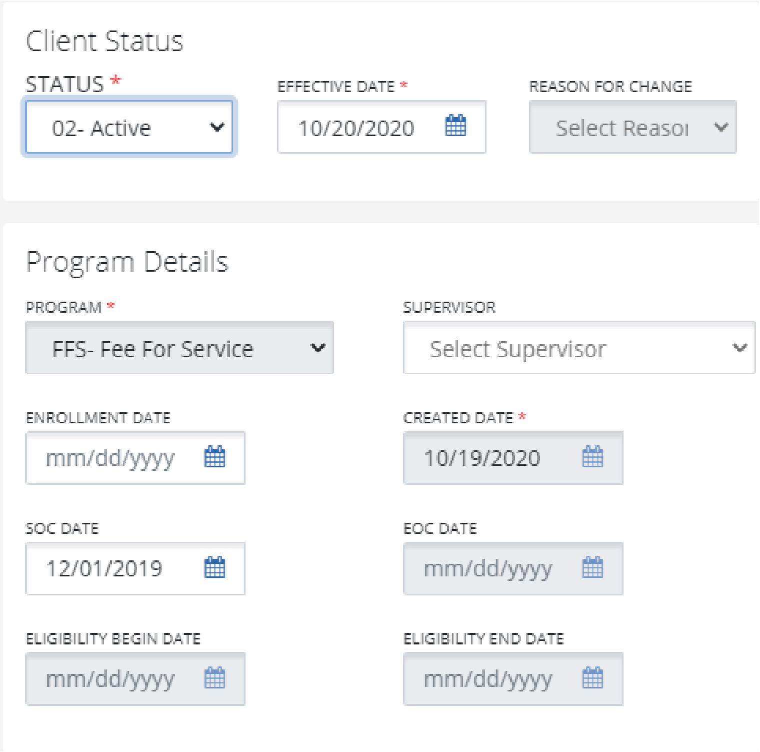
Complete Program Tab (2)

- Change the **Client Status** field from **01 - Pending** to **02 - Active**.
- The **Effective Date** field defaults to the date the client record is created.



Complete Program Tab (3)

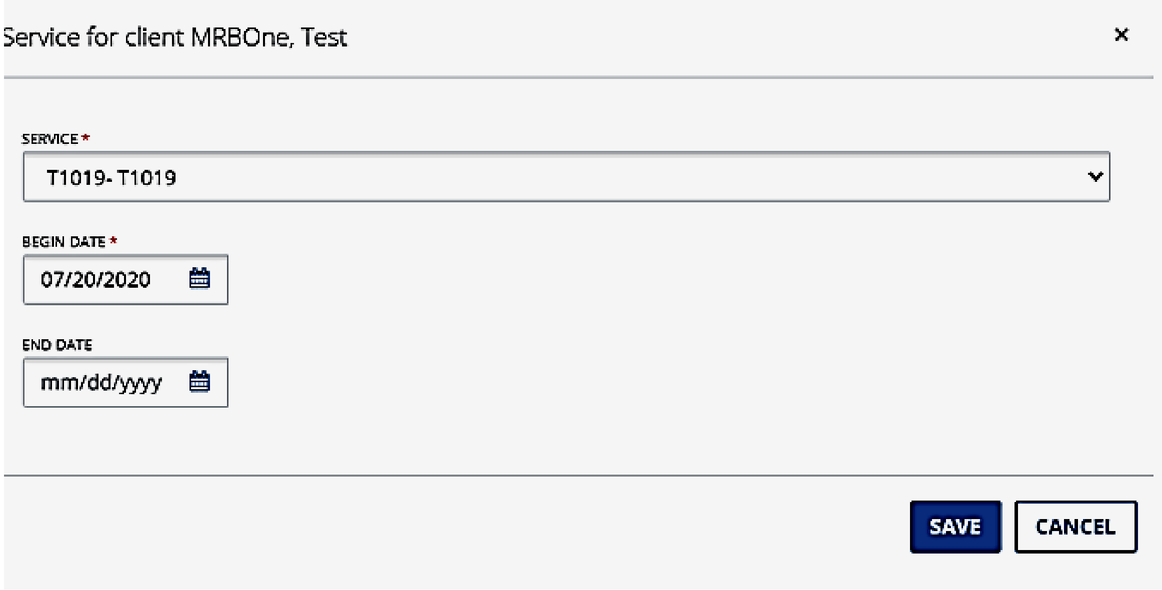
- To change start of care **SOC date** the client status must be set as **02-Active**.
- Enter new date in the **SOC Date** box.



Complete Program Tab (4)

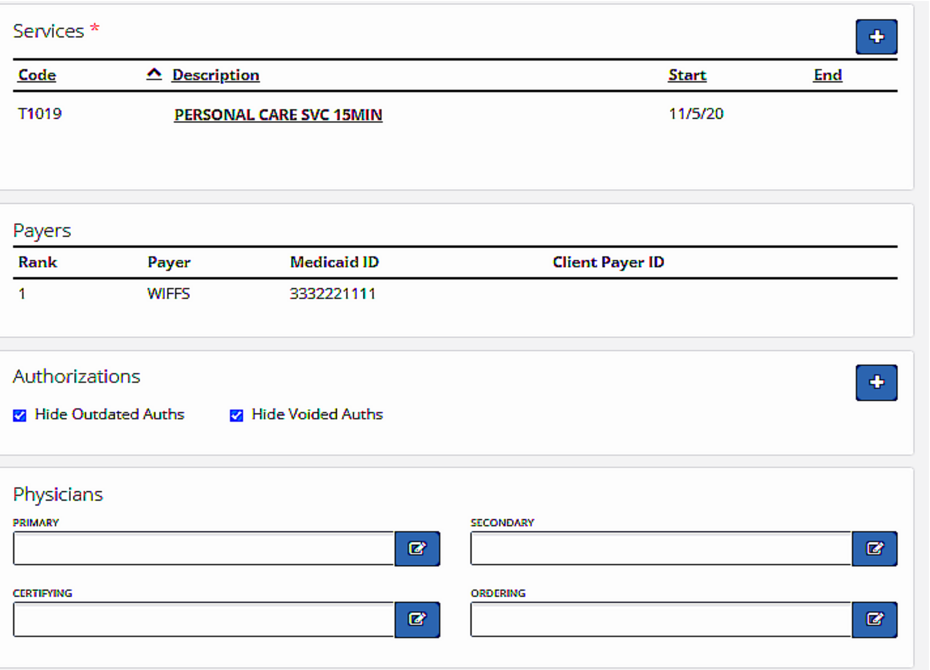
- Click the **+** sign to add a service.

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



Complete Program Tab (5)

- The Payer field will be auto-populated with Wisconsin Fee-for-Service (WIFFS).



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Create New Fee-for-Service Client Demonstration

Resources

Resources

- EVV Customer Care at 833-931-2035; Monday–Friday,
  7 a.m.–6 p.m.
- Email support at VDXC.ContactEVV@wisconsin.gov
- 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