



WISCONSIN DEPARTMENT
of HEALTH SERVICES

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

Agenda

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- How to Create a Fee-for-Service Client in the Sandata Portal
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- Create Fee-for-Service Client Demonstration
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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.



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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.

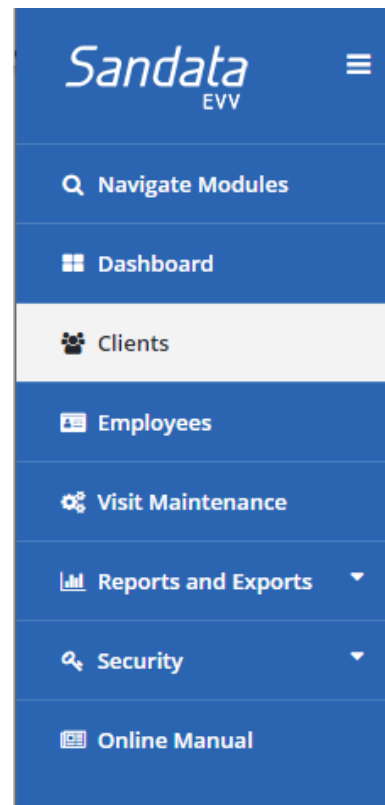
How to Create a Fee-for-Service Client in the Sandata EVV Portal (2)

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.

Select a Client / Program As of: 12:26 PM

CREATE FFS CLIENT

LAST NAME	FIRST NAME	STATUS	CLIENT ID
<input type="text" value="Medicaid"/>	<input type="text" value="Mary"/>	<input style="text-align: right; border-bottom: none; border-top: none; border-left: none; border-right: none;" type="text" value="Select Status"/> ▼	<input type="text" value="Enter Client ID"/>
CLIENT PAYER ID	MEDICAID ID	PROGRAM	LANGUAGE
<input type="text" value="Enter Client Payer ID"/>	<input type="text" value="Enter Medicaid ID"/>	<input style="text-align: right; border-bottom: none; border-top: none; border-left: none; border-right: none;" type="text" value="Select Program"/> ▼	<input style="text-align: right; border-bottom: none; border-top: none; border-left: none; border-right: none;" type="text" value="Select Language"/> ▼
PRIMARY PAYER			
<input style="text-align: right; border-bottom: none; border-top: none; border-left: none; border-right: none;" type="text" value="Select Primary Payer"/> ▼			

SEARCH

CLEAR

There are no records matching the provided search criteria

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

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

Select a Client / Program As of: 10:17 AM **CREATE FFS CLIENT**

LAST NAME <input type="text" value="Enter Last Name"/>	FIRST NAME <input type="text" value="Enter First Name"/>	STATUS <input style="border: none; border-bottom: 1px solid #ccc; text-align: right; font-size: small; color: #666;" type="text" value="Select Status"/> ▼	CLIENT ID <input type="text" value="Enter Client ID"/>
CLIENT PAYER ID <input type="text" value="Enter Client Payer ID"/>	MEDICAID ID <input type="text" value="Enter Medicaid ID"/>	PROGRAM <input style="border: none; border-bottom: 1px solid #ccc; text-align: right; font-size: small; color: #666;" type="text" value="Select Program"/> ▼	LANGUAGE <input style="border: none; border-bottom: 1px solid #ccc; text-align: right; font-size: small; color: #666;" type="text" value="Select Language"/> ▼
PRIMARY PAYER <input style="border: none; border-bottom: 1px solid #ccc; text-align: right; font-size: small; color: #666;" type="text" value="Select Primary Payer"/> ▼			

Q SEARCH

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.

New FFS Client

FIRST NAME *

LAST NAME *

PROGRAM * MEDICAID ID * CLIENT PAYER ID

SSN PHONE

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.

The screenshot displays a web form with two main sections: 'Personal' and 'Addresses (1)'. The 'Personal' section includes fields for Title (dropdown), First Name (text), Middle Initial (text), Last Name (text), Suffix (dropdown), SSN (text), Gender (dropdown), Birth Date (text with calendar icon), Primary Spoken Language (dropdown), Medicaid ID (text), and Client ID (text). A 'REQUEST DEVICE' button is located below these fields. The 'Addresses (1)' section features a dropdown for address type, an 'ADD NEW ADDRESS' button, and fields for Address Label, Address Line 1, Address Line 2, Zip Code, City, County, and State. Below this is a 'Phone Numbers, Etc' section with four phone number input fields and an 'ACTIVE' checkbox.

Personal | **Program** | **Diagnosis**

Personal

TITLE: Select Title (dropdown) | FIRST NAME *: test (text) | MIDDLE INITIAL: (text)

LAST NAME *: Member (text) | SUFFIX: Select Suffix (dropdown) | SSN: XXX-XX-XXXX (text)

GENDER *: 0- Unknown (dropdown) | BIRTH DATE: mm/dd/yyyy (text with calendar icon) | PRIMARY SPOKEN LANGUAGE: ENG- English (dropdown)

MEDICAID ID *: 1234567890 (text) | CLIENT ID: 103843 (text)

REQUEST DEVICE

Addresses (1)

(Current) (dropdown) | **ADD NEW ADDRESS** (button)

ADDRESS TYPE *: Select Address Type (dropdown) | ADDRESS LABEL: (text) | ADDRESS LINE 1 *: (text)

ADDRESS LINE 2: (text) | ZIP CODE *: (text) | CITY *: (text)

COUNTY: (text) | STATE *: Select State (dropdown)

Phone Numbers, Etc

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

EMAIL: (text) | **ACTIVE**

Complete Personal Tab (2)

Enter the client's address:

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

Addresses (1)

39 E State Street H- Home (Current)

ADDRESS TYPE * ADDRESS LABEL

H- Home

ADDRESS LINE 1 * ADDRESS LINE 2

39 E State Street

ZIPCODE * CITY * COUNTY

43207-____ Columbus Franklin

STATE *

Ohio

Complete Personal Tab (3)

- Enter other 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
<input type="text" value="() - -"/>	<input type="text" value="() - -"/>	<input type="text" value="() - -"/>	<input type="text" value="() - -"/>

EMAIL

ACTIVE

Complete Program Tab (1)

- Click the **Program** tab

Personal Program Diagnosis

Client Status

STATUS *
02- Active

EFFECTIVE DATE *
08/05/2020

REASON FOR CHANGE
Select Reason For Change

Program Details

PROGRAM *
WIIRISFEA- WIIRISFEA

SUPERVISOR
Select Supervisor

ENROLLMENT DATE
mm/dd/yyyy

CREATED DATE *
08/05/2020

SOC DATE
08/05/2020

EOC DATE
mm/dd/yyyy

ELIGIBILITY BEGIN DATE
mm/dd/yyyy

ELIGIBILITY END DATE
mm/dd/yyyy

Services *

Payers

Rank	Payer	Medicaid ID	Client Payer ID
1	PREMIER	1112221017	

Authorizations

Hide Outdated Auths Hide Voided Auths

Physicians

PRIMARY
SECONDARY

CERTIFYING
ORDERING

SAVE & CLOSE CANCEL

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.

The screenshot shows a form titled "Client Status" with three main fields: "STATUS *", "EFFECTIVE DATE *", and "REASON FOR CHANGE".

- The "STATUS *" field is a dropdown menu currently showing "01 - Pending". A blue highlight is visible on the "02 - Active" option in the dropdown list. Below the dropdown, the text "Program Details" is visible.
- The "EFFECTIVE DATE *" field contains the date "12/16/2020" and a calendar icon.
- The "REASON FOR CHANGE" field is a dropdown menu with the text "Select Reason For Change" and a downward arrow.

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.

Client Status

STATUS * 02- Active

EFFECTIVE DATE * 10/20/2020

REASON FOR CHANGE Select Reason

Program Details

PROGRAM * FFS- Fee For Service

SUPERVISOR Select Supervisor

ENROLLMENT DATE mm/dd/yyyy

CREATED DATE * 10/19/2020

SOC DATE 12/01/2019

EOC DATE mm/dd/yyyy

ELIGIBILITY BEGIN DATE mm/dd/yyyy

ELIGIBILITY END DATE mm/dd/yyyy

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**.




Service for client MRBOne, Test ×


SERVICE *

T1019- T1019 ▼

BEGIN DATE *

07/20/2020 

END DATE

mm/dd/yyyy 

SAVE **CANCEL**

Complete Program Tab (5)

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

Services *

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

Payers

Rank	Payer	Medicaid ID	Client Payer ID
1	WIFFS	3332221111	

Authorizations

Hide Outdated Auths Hide Voided Auths

Physicians

PRIMARY	<input type="text"/>	SECONDARY	<input type="text"/>
CERTIFYING	<input type="text"/>	ORDERING	<input type="text"/>



WISCONSIN DEPARTMENT
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Create New Fee- for-Service Client Demonstration



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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