# *ForwardHealth* UPDATE
### Wisconsin serving you

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## ELECTRONIC VISIT VERIFICATION TRAINING FOR PERSONAL CARE SERVICES AND SUPPORTIVE HOME CARE SERVICES

On November 2, 2020, the Wisconsin Department of Health Services (DHS) will begin implementing electronic visit verification (EVV). EVV will be required for Medicaid-covered personal care and supportive home care services that include personal care. EVV uses technology to verify that billed services were provided.

Refer to the July 2020 ForwardHealth Update (2020-31), titled "Implementation of Electronic Visit Verification for Personal Care and Supportive Home Care Services," for detailed information on EVV policy, technology, and validation.

### Training Overview

This Update provides EVV training information for personal care provider agencies, supportive home care agencies, and program payers. The intended audience for these trainings is provider agency and program payer administrative staff. The goal is for these staff to

**AFFECTED PROGRAMS**
BadgerCare Plus, Medicaid, Family Care, Family Care Partnership, IRIS, SSI HMOs, BadgerCare Plus HMOs

**TO**
Community Health Centers, Home Health Agencies, Personal Care Agencies, Tribal Federally Qualified Health Centers, HMOs and Other Managed Care Programs

**WISCONSIN DEPARTMENT**
*of* **HEALTH SERVICES**

be trained on EVV so that they in turn can train other agency staff, including workers.

DHS will provide an EVV system free of charge. However, provider agencies may choose to purchase an alternate system that meets DHS requirements.

DHS will offer EVV-system trainings for administrative staff, specific to the EVV system being used:

- DHS EVV training (for the Sandata system provided by DHS) will include general EVV functionality, Sandata technology, and Wisconsin-specific information.
- Sandata Aggregator training (for EVV systems not provided by DHS) will cover Sandata's aggregator, the technology that integrates information from alternate or third-party EVV systems with the DHS EVV solution.

## Provider Agency Identifier Training

A Medicaid ID is required to register for the DHS EVV training and the Sandata Aggregator training. Provider agencies that are not Medicaid enrolled can take an on-demand training to learn how to request a provider agency ID and to set up a secure account on the ForwardHealth Portal.

> **The goal is for these staff to be trained on EVV so that they in turn can train other agency staff, including workers.**

Those agencies can access the How Non-Medicaid Providers Apply for an Electronic Visit Verification Unique Provider Agency Identifier training on the DHS Electronic Visit Verification (EVV): Training webpage.

## DHS EVV Training

DHS, with assistance from its EVV vendor Sandata, is offering training options to ensure providers can train their workers on capturing EVV data in the DHS EVV system.

### Audience

Personal care provider agencies, fiscal employer agencies (FEAs), and groups functioning as provider agencies (for example, IRIS [Include, Respect, I Self Direct] microboards) who plan to use DHS-provided EVV should participate in DHS EVV training. HMOs and managed care organizations (MCOs), IRIS consultant agencies (ICAs), and the IRIS self-directed personal care (SDPC) agency may also attend these trainings for informational purposes, but they are not required to do so.

Provider agencies and program payers using alternate EVV, along with HMOs and MCOs, should refer to the Sandata Aggregator Training section of this Update.

### Registration

Registration information for DHS EVV training is available on the DHS [Electronic Visit Verification (EVV): Training](#) webpage. To register for trainings, the agency will need to have its Medicaid ID or provider agency ID available. There is no fee for training.

### Covered Topics

Trainings will include the following topics:

- Program overview:
  - EVV program
  - Services included
- Provider agency identification:
  - Creating a ForwardHealth Portal account
  - Obtaining a provider agency ID number (for non-Medicaid-enrolled provider agencies)
- Worker identification:
  - Identifying workers on the ForwardHealth Portal
  - Maintaining workers on the ForwardHealth Portal
- Sandata EVV Portal:
  - Logging in
  - Navigation
  - Functionality
- Sandata system security:
  - Assigning and modifying user roles and securities
  - Authenticating users
  - Resetting and changing passwords
- Members, participants, and workers:
  - Maintaing member/participant and worker records
  - Understanding member/participant record flow to the Sandata portal
- Visit verification:
  - Using the three methods of EVV data collection
- Visit maintenance:
  - Managing and correcting visit exceptions
  - Creating a manual visit on the Sandata EVV portal
- Reports:
  - Creating daily and date range reports

> **DHS, with assistance from its EVV vendor Sandata, is offering training options to ensure providers can train their workers on capturing EVV data in the DHS EVV system.**

- DHS EVV specifics:
  - Covered services
  - Live-in workers
  - Group visits
  - Visits over multiple days of service
  - Documentation requirements

## Formats

Trainings will include two formats for flexible learning, including:
- Instructor-led web-based training (three two-hour modules)
- Independent (on-demand) web-based training (two and a half hours, plus reading time)

Each format will include the same training materials and cover the same topics. Due to the volume of provider agency staff and the number of questions that could arise during a trainer-led session, DHS has determined that up to two representatives from each provider agency or program payer will be able to attend instructor-led web-based trainings. There is no limit to the number of attendees for the independent (on-demand) web-based training. Refer to the Attachment of this Update for the schedule of instructor-led web-based trainings.

After Wisconsin's soft launch date of November 2, 2020, only independent (on-demand) web-based training will be available. There is no limit to how many representatives can attend the on-demand training, or how often they access it. On-demand training can be used by first-time learners or as a review method for those who attended other trainings.

If health and safety conditions allow, in-person computer lab trainings may be scheduled at a later date.

## Methods and Timeline

DHS will engage provider agencies and program payers using the DHS EVV system in a train-the-trainer model. With this model, the initial trainer in a provider agency will first complete the training and establish an account on the Sandata EVV portal. In addition, that person will be responsible for training other administrators within their agency. Trained agency staff will also train workers using the tools and resources provided in the training and on the Electronic Visit Verification (EVV): Training webpage.

Within the IRIS program, IRIS consultant agencies will train IRIS participants. The participants are then responsible for ensuring their participant-hired workers are trained to use the system.

# RESOURCES
- Wisconsin EVV Customer Care: 833-931-2035
- Email support: VDXC.ContactEVV@wisconsin.gov
- DHS EVV webpage: https://www.dhs.wisconsin.gov/evv/index.htm

For the Family Care program, FEAs will train self-directed workers, and members will make sure their self-directed workers use the system.

DHS will provide the online resources needed for these trainings.

| TIMEFRAME | AUDIENCE | METHODS |
|---|---|---|
| August 18, 2020– October 9, 2020 | • Up to two representatives from each provider agency and FEA for instructor-led web-based training<br>• Program payer, ICA, and SDPC administrator attendance is optional | DHS will provide training on the DHS EVV system via the following:<br>• Instructor-led web-based training<br>• Independent (on-demand) web-based training |
| Prior to November 2, 2020 | • Additional administrative users<br>• Workers | Trained administrative staff from provider and program payers will be responsible for training additional administrative users, as well as workers associated with their organization. Resources will be available on the Electronic Visit Verification (EVV): Training webpage. |
| On and after November 2, 2020 | All provider agency staff, program payer staff, ICA, SDPC, and workers | Web-based trainings for organizations and workers will be available before and after the soft launch. |

## Sandata Aggregator Training

DHS will be using Sandata technology called an aggregator. The aggregator integrates EVV data into the DHS EVV solution. The aggregator is used when collecting EVV data from an alternate EVV data collection system that is not provided by DHS.

Additional information about alternate EVV system business and technical requirements and certification may be found on the DHS Electronic Visit Verification (EVV): Alternate EVV webpage.

## Audience

Provider agencies who use an alternate EVV system, as well as all HMOs, MCOs, and FEAs, should participate in a Sandata Aggregator training.

A webinar for program payers will be held in mid-November 2020. Program payers will benefit from this training because it will show them how to view all applicable visits in the same format, regardless of the EVV system (DHS EVV or alternate EVV) used to collect the visit data.

> " **Provider agencies who use an alternate EVV system, as well as all HMOs, MCOs, and FEAs, should participate in a Sandata Aggregator training.**

## Registration

The Sandata Aggregator training is available through a link emailed from Sandata. There is no fee for training.

## Covered Topics

Sandata Aggregator training will cover the following topics:

- Introduction
  - Initial log in
  - Navigation
  - Password reset
- Security and users
  - Create and maintain users
  - Create and maintain user roles
- Visit review
  - Visit details
  - Visit filter and sort
- Reports
  - Running reports
  - Analyzing report data
  - Sample reports

Agencies using an alternate EVV system should receive training on their chosen alternate EVV system from the system's vendor.

## Format

Aggregator training will be offered as an independent (on-demand) training only. The training duration is 30 minutes.

## Methods and Timeline

This recorded training will be available through a link emailed from Sandata as part of the alternate EVV certification process.

| TIMEFRAME | AUDIENCE | METHODS |
|---|---|---|
| July 22, 2020, and after | Representatives from provider agencies using an alternate EVV system | Sandata Aggregator training will be available online via Sandata's learning management system. |
| Prior to November 1, 2020 | Additional administrative users and workers | Training relevant to specific alternate EVV systems should be arranged by the organizations using those systems and the alternate EVV vendors. |
| Mid-November 2020 | HMO, MCO, and FEAs | DHS will provide webinar training specific to program payer aggregator use. |

## Training Materials

Training materials will be available to ensure all stakeholders are knowledgeable about EVV. The materials may be accessed via the DHS Electronic Visit Verification (EVV): Training website. Materials will include general EVV, Wisconsin-specific, and aggregator information. The materials will be available before implementation and may be accessed at any time after that.

## Languages and Accessibility

Written training materials will be available in English, Spanish, and Hmong, and other languages as requested. Recorded trainings are closed-captioned in English.

# ATTACHMENT
## Electronic Visit Verification System
## Instructor-Led Web-Based Training Modules

The following table lists the dates and times of the Wisconsin Department of Health Services' Electronic Visit Verification (EVV) instructor-led web-based training modules on the use of the Department of Health Services EVV system. The full training course consists of three two-hour modules. The modules should be taken in order. To register for trainings, go to the Department of Health Services Electronic Visit Verification (EVV): Training webpage or call Wisconsin EVV Customer Care at 833-931-2035.

Due to time and space limitations, **up to two representatives from each provider agency and each program payer will be able to attend instructor-led web-based trainings**.

Additional instructor-led web-based trainings may be added if there is sufficient demand. To stay informed about additional trainings, refer to the EVV Training webpage. While instructor-led web-based trainings are recommended, independent (on-demand) web-based trainings are also available.

| MODULES | DATES | TIMES |
|---|---|---|
| **Module 1**<br>• Program Overview<br>• System Overview<br>• Security<br>• Employee Format<br>• Client Format | August 18, 2020 | 9–11 a.m. |
| | August 19, 2020 | 1–3 p.m. |
| | August 31, 2020 | 9–11 a.m. |
| | September 1, 2020 | 1–3 p.m. |
| | September 8, 2020 | 9–11 a.m. |
| | September 9, 2020 | 1–3 p.m. |
| | September 11, 2020 | 9–11 a.m. |
| | September 15, 2020 | 9–11 a.m. |
| | September 16, 2020 | 1–3 p.m. |
| | September 18, 2020 | 9–11 a.m. |
| | September 22, 2020 | 1–3 p.m. |
| | September 24, 2020 | 9–11 a.m. |

| MODULES | DATES | TIMES |
|---|---|---|
| | September 28, 2020 | 1–3 p.m. |
| | September 30, 2020 | 9–11 a.m. |
| | October 1, 2020 | 1–3 p.m. |
| | October 7, 2020 | 9–11 a.m. |
| | October 8, 2020 | 1–3 p.m. |
| **Module 2**<br>• Mobile Visit Verification (MVV)<br>• Telephonic Visit Verification (TVV)<br>• Fixed Visit Verification (FVV)<br>• Group Visits | August 18, 2020 | 1–3 p.m. |
| | August 20, 2020 | 9–11 a.m. |
| | August 31, 2020 | 1–3 p.m. |
| | September 2, 2020 | 9–11 a.m. |
| | September 8, 2020 | 1–3 p.m. |
| | September 10, 2020 | 9–11 a.m. |
| | September 11, 2020 | 1–3 p.m. |
| | September 15, 2020 | 1–3 p.m. |
| | September 17, 2020 | 9–11 a.m. |
| | September 21, 2020 | 1–3 p.m. |
| | September 23, 2020 | 9–11 a.m. |
| | September 24, 2020 | 1–3 p.m. |
| | September 29, 2020 | 9–11 a.m. |
| | September 30, 2020 | 1–3 p.m. |
| | October 6, 2020 | 9–11 a.m. |
| | October 7, 2020 | 1–3 p.m. |
| | October 9, 2020 | 9–11 a.m. |

| MODULES | DATES | TIMES |
|---------|-------|-------|
| **Module 3**<br>• Visit Maintenance<br>• EVV Reports<br>• Recap and Next Steps | August 19, 2020 | 9–11 a.m. |
| | August 20, 2020 | 1–3 p.m. |
| | September 1, 2020 | 9–11 a.m. |
| | September 2, 2020 | 1–3 p.m. |
| | September 9, 2020 | 9–11 a.m. |
| | September 10, 2020 | 1–3 p.m. |
| | September 14, 2020 | 1–3 p.m. |
| | September 16, 2020 | 9–11 a.m. |
| | September 17, 2020 | 1–3 p.m. |
| | September 22, 2020 | 9–11 a.m. |
| | September 23, 2020 | 1–3 p.m. |
| | September 25, 2020 | 9–11 a.m. |
| | September 29, 2020 | 1–3 p.m. |
| | October 1, 2020 | 9–11 a.m. |
| | October 6, 2020 | 1–3 p.m. |
| | October 8, 2020 | 9–11 a.m. |
| | October 9, 2020 | 1–3 p.m. |