



Visit Maintenance

EVV Portal Guide for Employers and
Designees

Need more help? Contact:

EVV Support Center
(833) 675-4306

Table of Contents



What is visit confirmation? 2

How do I confirm a visit using the mobile app?..... 3

How do I confirm a visit using a telephone? 3

What is Visit Maintenance? 4

My employee forgot to call-in or call-out. What should I do?..... 5

I need to add a visit. What should I do? 10

How do I add a task?..... 11

My employee forgot to add a visit note. What should I do?..... 12

What can I find on the other tabs? 13

How do I change my password? 19

What is visit confirmation?



Your employee will either use a telephone or the mobile app to log visit start and end times, and the services provided during each visit. Your employee may also be required to enter at least one task performed during each visit. Check with your State's program.

You may have the option of using a Fixed Visit Verification device if your employee(s) can neither use a telephone nor the mobile app. Check with your State's program.

At the end of each visit, your employee will pass the phone or mobile device to you to confirm the details of the visit. If your employee is using the mobile app, you will be able to either provide an electronic signature by signing on the device or by recording your voice. You may not be required to provide an electronic signature. Check with your State's program.

How do I confirm a visit using the mobile app?



Once your employee enters the information to complete the visit, your employee will pass the mobile device to you to confirm the visit. The **Client Verify** screen will display. You will verify the visit from this screen. Refer to the **Mobile App Guide** for more details about how to use the mobile app.

How do I confirm a visit using a telephone?

Once your employee enters the information to complete the visit, your employee will hand the telephone to you to confirm the visit. You will record a voice confirmation for the visit. Refer to the **Telephone Visit Verification (TVV) Toolkit** for more details about how to use TVV.

What is Visit Maintenance?



Sometimes there might be information that is missing from a visit or could not be verified by the EVV system. For example, Mary might forget to check-in or check-out, a service or task might be missing, or the location could not be verified. These are called Exceptions and the process to handle these exceptions is called Visit Maintenance.

A visit goes through statuses as visit details are recorded and updated.

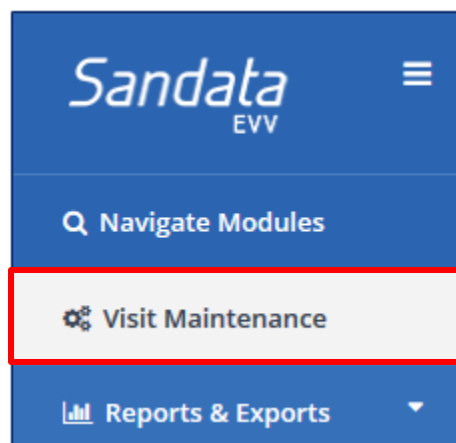


My employee forgot to call-in or call-out. What should I do?



If your employee forgot to call-in at the start of a visit, call-out at the end of a visit, or mark the tasks performed during the visit, you may update the visit yourself.

From the EVV Portal menu, click **Visit Maintenance**.



The Manage Visits screen displays.

Select a Visit [CREATE CALL](#)

DATE RANGE MM/DD/YYYY to

CLIENT EMPLOYEE

CATEGORY PAYER

VISIT STATUS CLIENT MEDICAID ID

FILTER VISITS BY

[Show advanced filter options](#)

Click the calendar icon to change the start date and end date to find a visit. Then click **SEARCH**.



Select a Visit **CREATE CALL**

DATE RANGE MM/DD/YYYY

02/04/2019 to 03/31/2019

CLIENT EMPLOYEE

CATEGORY VISIT STATUS

CLIENT MEDICAID ID

FILTER VISITS BY

Q SEARCH **CLEAR**

[Show advanced filter options ▼](#)

If your employee worked during the start date and end date, a list of visits will be displayed.


Show: per page [Show Display Options ▼](#)

< < 1 > > [Show Legend](#) Showing 1 to 3 of 3 entries


Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Pay Hours	Bill Hours	Visit Status	Do Not Bill	Appr
Grayson, Pete	Garner, Pam	PCA OVER-CFC/CHC	02/11/2019	●	10:08 AM					[---]	[---]	Incomplete	<input type="checkbox"/>	
Grayson, Pete	Garner, Pam	NURSE TRAINING-CFC	02/05/2019	10:46 AM	03:53 PM	05:07				05:00	05:07	Incomplete	<input type="checkbox"/>	
Grayson, Pete	Garner, Pam	NURSE TRAINING-CFC	02/05/2019	●	08:56 AM					[---]	[---]	Incomplete	<input type="checkbox"/>	




< < 1 > > Showing 1 to 3 of 3 entries

APPROVE ALL **DISAPPROVE ALL**

Click either the visit or the Edit icon  all the way to the right to view the details of the visit.




You might need to use the scroll bar at the bottom of the page to move to the right to see the Edit icon .

ee	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Pay Hours	Bill Hours	Visit Status	Do Not Bill	Approved	Actions
; Pam	PCA OVER-CFC/CHC	02/11/2019	●	10:08 AM					[--]	[--]	Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
; Pam	NURSE TRAINING-CFC	02/05/2019		10:46 AM	03:53 PM	05:07			05:00	05:07	Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	
; Pam	NURSE TRAINING-CFC	02/05/2019	●	08:56 AM					[--]	[--]	Incomplete	<input type="checkbox"/>	<input type="checkbox"/>	



The Visit Details screen displays details about you and your employee such as CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME, and EMPLOYEE ID for the visit. Use the tabs on the left to view additional details about the visit.

Visit Details					Visit Start Date: 02/05/2019	
CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #		
Grayson, Pete	32546	900123987453	Garner, Pam	89776		

GENERAL: Displays the start and end time, status, service, among other details for the selected visit.

Visit Details

Visit Start Date: 02/05/2019

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

TASKS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

VISIT START DATE

None

VISIT END DATE

02/05/2019

VISIT TIME ZONE

America/New_York

VISIT STATUS

Incomplete

CALL IN

None

CALL OUT

08:56 AM

CALL HOURS

None

ADJUSTED IN DATE

MM/DD/YYYY

ADJUSTED IN HH:MM AM/PM

ADJUSTED OUT DATE

02/05/2019

ADJUSTED OUT HH:MM AM/PM

08:56 AM

AGENCY ID

14425

AGENCY NAME

UAT CT DSS

BILL HOURS

PAY HOURS

PAYER

CTDSS

PROGRAM

CTCDS

SERVICE

NURSE TRAINING

CLIENT VERIFIED TIME

Yes

CLIENT VERIFIED SERVICE

Yes

CLIENT SIGNATURE

Yes

VISIT SOURCE

CT DSS CDS

DO NOT BILL

APPROVED



If you need to update the call-in or call-out time, type the Adjusted In Date, Adjusted In Time, Adjusted Out Date, Adjusted Out Time, or Service on the General screen and click Save.

Visit Details

Visit Start Date: 02/05/2019

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

TASKS

VISIT START DATE

None

VISIT END DATE

02/05/2019

VISIT TIME ZONE

America/New_York

VISIT STATUS

Incomplete

CALL IN

None

CALL OUT

08:56 AM

CALL HOURS

None

ADJUSTED IN DATE

MM/DD/YYYY

ADJUSTED IN HH:MM AM/PM

ADJUSTED OUT DATE

02/05/2019

ADJUSTED OUT HH:MM AM/PM

08:56 AM

I need to add a visit. What should I do?



If your employee forgot to record a visit, you will need to add a visit on the Call Log screen. Enter the call-in time, enter the call-out time, select the Service, and select the Reason for adding the visit. Click Add.

CALL LOG: Displays the details of the call-in/call-out times and the type of call (TVV, MVV, or Manual Call.)

Visit Details

Visit Start Date: 02/05/2019

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

TASKS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

INTERIM

CLIENT ID# 32546

CALL DATE	CALL TIME	CALL TYPE	SERVICE
02/05/2019	08:55 AM	MVV (Mobile, GPS)	NURSE TRAINING-CFC

USER

LATITUDE

LONGITUDE

CALL SOURCE

Pgarnersandata@gma...

41.76795377430879

-72.68775766285334

CT DSS CDS

CALL OUT

CLIENT ID# 32546

CALL DATE	CALL TIME	CALL TYPE	SERVICE
02/05/2019	08:56 AM	MVV (Mobile, GPS)	NURSE TRAINING-CFC

USER

LATITUDE

LONGITUDE

CALL SOURCE

Pgarnersandata@gma...

41.76792057636086

-72.68770659307633

CT DSS CDS

Add Manual Call

CALL DATE * MM/DD/YYYY

CALL TIME * HH:MM AM/PM

SERVICE

MM/DD/YYYY

08:34 PM

Select Service

REASON CODE *

REASON NOTE

ADD

Select Reason Coc

Reason Note

How do I add a task?



If your employee forgot to add a task, you may add a task from the Tasks screen.

TASKS: Displays the tasks performed for the visit. The Status column displays 'Completed' if a task was completed or 'Refused' if you declined a task.

Visit Details

Visit Start Date: 02/05/2019

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

TASKS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

Task ID	Description	Reading	Manually Added	Status
0200	Accompany to medical appointment		No	Completed

Showing 1 to 1 of 1 entries

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Add Task

TASK *

READING

REASON CODE *

Select Task

Select Reason Code

REASON NOTE

Reason Note

ADD

My employee forgot to add a visit note. What should I do?



MEMO: Your employee may enter notes about the visit. The **Visit Note** screen displays the notes entered in the mobile app at the end of the visit. Type the visit note and click SAVE.

Visit Details

Visit Start Date: 02/05/2019

CLIENT NAME

Grayson, Pete

CLIENT ID #

32546

MEDICAID ID #

900123987453

EMPLOYEE NAME

Garner, Pam

EMPLOYEE ID #

89776

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

TASKS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

MEMO

Enter Memo

1024 characters remaining.

SAVE

VISIT NOTE

Visit Note



The visit note should not be used to satisfy documentation requirements.

What can I find on the other tabs?



CLIENT: Displays details about your ADDRESS, PHONE NUMBER, and LANGUAGE PREFERENCE.

Visit Details				Visit Start Date: 02/05/2019	X
CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #	
Grayson, Pete	32546	900123987453	Garner, Pam	89776	

- GENERAL
- CLIENT**
- EMPLOYEE
- CALL LOG
- MERGE CALLS
- TASKS
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

Client Contact Information

ADDRESS TYPE	ADDRESS LINE 1	ADDRESS LINE 2	CITY
Home	7708 San Felipe	None	Austin
STATE	ZIP CODE		
TX	78729-0000		
PHONE NUMBER			
(516) 484-4400			
EMAIL ADDRESS	GENDER	LANGUAGE PREFERENCE	SUPERVISOR
heyblabalot@gmail.com	Male	English	None
TIME ZONE			
US/Eastern			

Emergency Contact Information

Find Client

LAST NAME	FIRST NAME	CLIENT ID #	
<input type="text" value="Enter Last Name"/>	<input type="text" value="Enter First Name"/>	<input type="text" value="Enter Client ID #"/>	Q
CLIENT MEDICAID ID	<input type="checkbox"/> INCLUDE INACTIVE CLIENTS		
<input type="text" value="Enter Client Medicaid ID"/>			

EMPLOYEE: Displays details about your employee such as: EMPLOYEE EMAIL, SANTRAX ID, ADDRESS, and PHONE NUMBER.

Visit Details

Visit Start Date: 02/05/2019

×

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

TASKS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

SANTRAX ID	PRIMARY PHONE NUMBER	DISCIPLINE	
89776	None	None	
ADDRESS LINE 1	ADDRESS LINE 2	CITY	STATE
None	None	None	None
ZIP CODE	TERMINATION DATE		
None	None		
PROVIDER ID			
9521453			



If you need to update your mailing address, phone number, or email address, contact Allied Community Resources by phone at (860) 627-9500 or by email at EVVinfo@alliedgroup.org.

MERGE CALLS: Displays a list of calls that may be merged with a visit if the visit is missing a call time. Calls can be merged if start/end times are close and they are not associated with another visit.

Visit Details
Visit Start Date: 02/20/2019

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
(330)666-2022				

GENERAL
CLIENT
EMPLOYEE
CALL LOG
MERGE CALLS
TASKS
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY

Below is a list of all calls that are close to the scheduled time.

	PHONE #	CALL TIME	CALL DATE	CLIENT NAME	EMPLOYEE NAME
<input type="radio"/>	(330) 666-2022	11:37 AM	2/20/2019	(330)666-2022	
<input type="radio"/>	(330) 666-2022	11:38 AM	2/20/2019	(330)666-2022	

Showing 1 to 2 of 2 entries

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EXCEPTIONS: Displays the exceptions for the visit and the options to resolve each exception.

Visit Details
Visit Start Date: 03/03/2019

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
(575)323-7846				

GENERAL
CLIENT
EMPLOYEE
CALL LOG
MERGE CALLS
TASKS
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY

☐ SELECT ALL

Unknown Clients	This exception needs to be fixed
Unknown Employees	This exception needs to be fixed
Visits Without Out-Calls	This exception needs to be fixed
Missing Tasks	This exception needs to be fixed
Missing Service	This exception needs to be fixed
Visit Verification Exception	<input type="checkbox"/> ACKNOWLEDGE THIS EXCEPTION
Client Signature Exception	<input type="checkbox"/> ACKNOWLEDGE THIS EXCEPTION

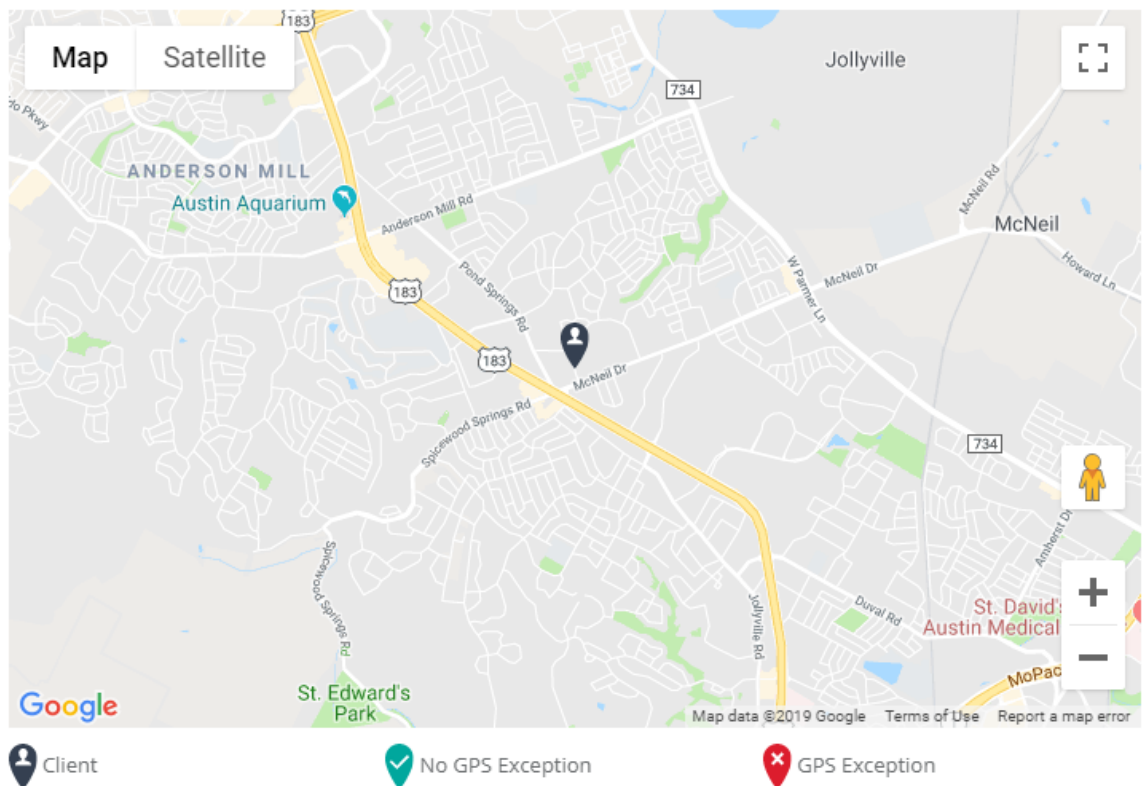


Only you or your designee can acknowledge visit exceptions.

GPS: Displays the location of the SMC app start and end times and your service address.

Visit Details				Visit Start Date: 02/05/2019
CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- TASKS
- EXCEPTIONS
- GPS**
- MEMO
- CLAIMS
- HISTORY



HISTORY: Displays visit history and any change made to the visit. The most recent changes appear at the top of the screen.

Visit Details

Visit Start Date: 02/05/2019 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

GENERAL
CLIENT
EMPLOYEE
CALL LOG
TASKS
EXCEPTIONS
GPS
MEMO
CLAIMS
HISTORY

REASON CODE	ITEM	DATE	CHANGED BY
09 - Phone in Use by Patient/Family	Manual Call - Add to Specified Visit	3/28/2019 3:54:26 PM	PGIBSON@SANDATA.COM

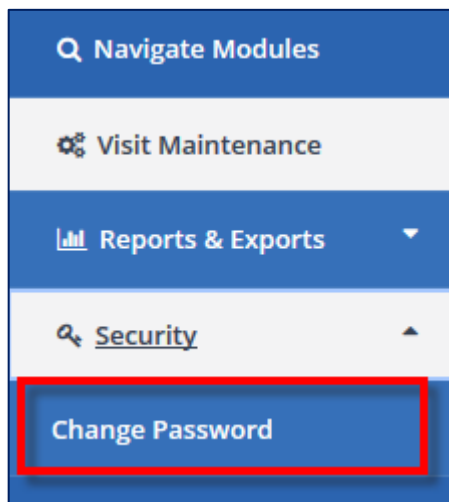
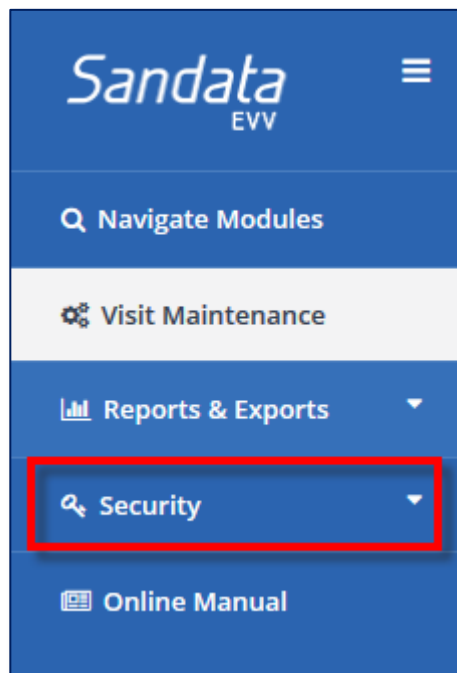
Showing 1 to 1 of 1 entries

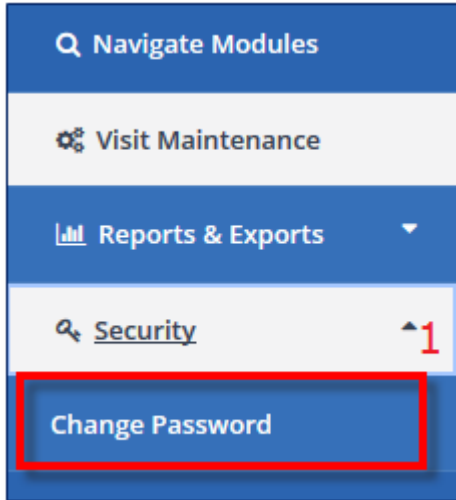
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How do I change my password?



You may change your password for the EVV Portal. From the EVV Portal menu, click **Security**. The Security menu expands and displays the Change Password option.





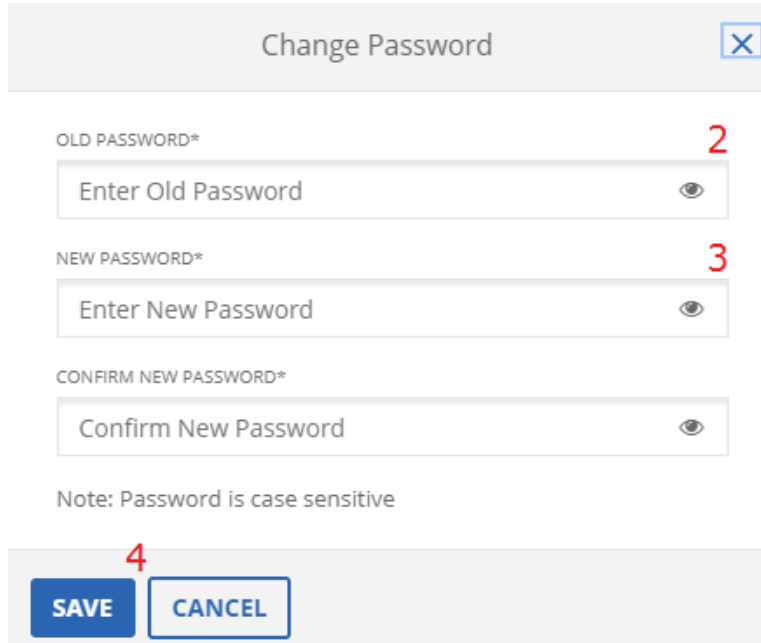
Q Navigate Modules

Visit Maintenance

Reports & Exports

Security ¹

Change Password



Change Password ✕

OLD PASSWORD* ²

Enter Old Password 👁

NEW PASSWORD* ³

Enter New Password 👁

CONFIRM NEW PASSWORD*

Confirm New Password 👁

Note: Password is case sensitive

⁴ **SAVE** **CANCEL**

1. Click **Change Password**.
2. Enter your current password in the **Enter Old Password** field.
3. Enter your new password in the **Enter New Password** field.
4. Type your new password again in the **Confirm New Password** field.
5. Click **SAVE**.