HHAeXchange

EVV Management Process Guide

Managing Electronic Visit Verification

Document Revision History

Date	Description of Revision
06/03/2016	Initial version of the document
10/24/2016	Update: EVV Based Visit Scheduling and Confirmation
11/16/2016	• Update: Disable Visit creation based on EVV for Patients • Update: Service-Specific EVV Confirmation
02/02/2017	• Update: Edit GPS Coordinates
02/16/2017	• Update: Automatic Visit Creation for Contracts
03/20/2018	General documentation updates
10/15/2018	Added Patient Multi-Address information to Patient Setup
03/21/2019	• Added: EVV Patient with Multiple Addresses to Call Dashboard
05/07/2019	• Added: Note reference to the Confirm Timesheet (Beta) page
03/03/2020	Added: Tracking Location Where EVV is Performed
10/26/2020	• Added: Patient Voice Verification on IVR Clock Out • Added: Documenting an Alternate EVV Workflow Verification
12/28/2020	• Added: Verification Tab in Visit Info Page
03/15/2021	Accessibility standards applied
05/27/2021	EVV Attestation Update EVV Required Update (field automatically enabled) Patient Phone Number/Address defaults to Primary Address Type value defaults to Home
09/15/2022	General updates applied
09/19/2022	Add Service Location Edits (Cures Act Requirements)

	Add Permissions for Linking EVV
01/23/2023	Update EVV Linking Permissions content Link to Automatic Creation of Schedules Job Aid (replace old content)

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Overview

DISCLAIMER
The EVV feature is activated by HHAX System Administration. Please contact HHAX Support Team for details, setup, and guidance.

Electronic Visit Verification (EVV) is a type of visit confirmation which allows Caregivers to Clock-In and Out of visits from the Patient's home. EVV provides reliable time confirmations and helps to verify that the Caregiver is physically with the Patient when Clocking-In and Out.

This guide covers how to **Set Up EVV**, **Review Successful EVV Information**, and **Manage Unsuccessful EVV**.

Please direct any questions, thoughts, or concerns regarding the content herein to HHAeXchange Client Support.

HHAX System Key Terms and Definitions

The following provides basic definition of HHAX System key terms applicable throughout the document.

| Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Payer	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
HHAX	Acronym for HHAeXchange

EVV Specific Terms

The following EVV-specific terms that are used within this document.

Term	Definition
Caller ID	Refers to IVR/Telephony
Call	Refers to any logging of EVV.

EVV Process Flow

The flowchart below illustrates the process flow on how EVV works in the HHAeXchange (HHAX) system.
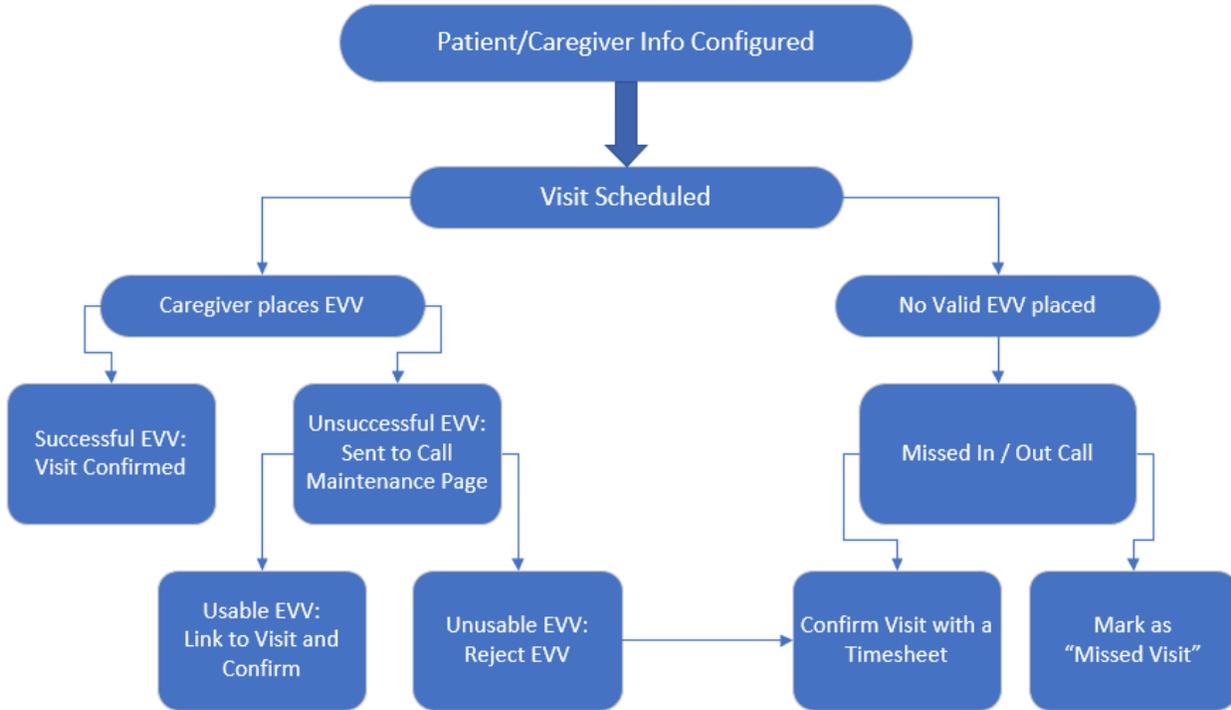
Note: *Some Agencies may have their own internal policies for EVVs and manual visit updates. Please ensure to check with your Agency's Compliance Officer to confirm internal practices and procedures.*

EVV Configuration

Agencies must determine the functional parameters of EVV confirmation and properly manage information and settings on *Patient* and *Caregiver* Profiles. This ensures proper usability and success of EVV.

Agency Setup

EVV confirmation may be made using Caller ID, GPS, or FOB codes. Each method must be activated and set up manually by the Agency on the **Agency Profile** and **Office Setup** pages.

Agency Profile

Navigate to **Admin > Agency Profile** to setup EVV configuration at the Agency level. The system stores up to 3 unique phone numbers for every Patient. On the **Accept Time and Attendance Call From** field determine which of these phone numbers is to be used for Caller ID-based EVV.

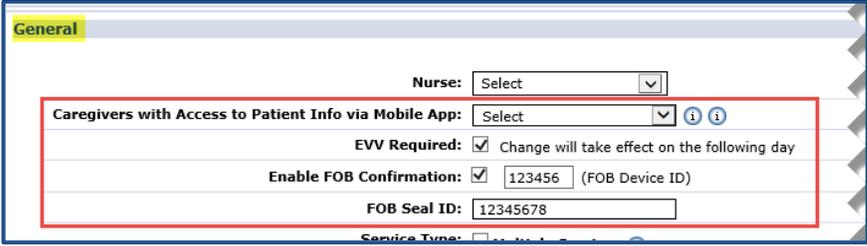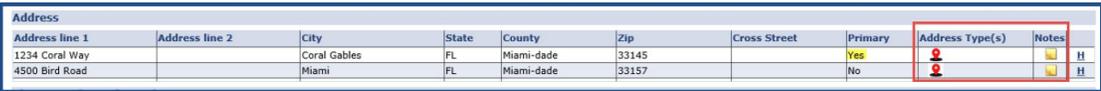

Accept Time and Attendance Call

Office Setup

Navigate to **Admin > Office Setup** to setup EVV configuration at the Office level as described in the table below.

| Field	Description (This allows…)
Mobile GPS Visit Verification /Tolerance Range (ft)	Caregivers to place EVVs using the Mobile App. The **Tolerance Range (ft)** refers to the acceptable distance range a Caregiver can make a valid EVV from. If the **Tolerance Range** is set to 100 feet, the Caregiver can successfully place an EVV via GPS within 100 feet of the Patient's address based on the address's coordinates. `* Mobile GPS Visit Verification: ☑ Tolerance Range (ft): 100 ⓘ` **Mobile GPS Visit Verification/Tolerance Range**
Mobile Fixed Visit Verification	Caregivers to enter FOB codes using the Mobile App. `Mobile Fixed Visit Verification: ☐ ⓘ` **Mobile Fixed Visit Verification**
Unbalanced Tolerance	To set a window for Caregivers to place a linkable EVV. For example, if the **Unbalanced Tolerance** is set to 15 minutes, then the Caregiver has 15 minutes from the scheduled start time of the visit to place an EVV. If they attempt to place one outside of this window, the EVV will not link to the visit. `UnBalanced Tolerance: Hours 0 Min 15 ⓘ` **Unbalanced Tolerance**

Patient Setup

When a Caregiver Clocks In or Out, the system verifies the EVV based on information maintained on the Patient's *General* and *Profile* pages. Follow the steps below to enter and maintain Patient confirmation information.

Step	Action
1	Navigate to *Patient > General* and select the *Edit* button.
2	The EVV settings are in the *General* section as illustrated in the image below and described underneath. **EVV Setup in Patient General Page** • The **EVV Required** checkbox is automatically selected when a *Referral* converted to a *Patient*. • Select the **Enable FOB Confirmation** checkbox if the Patient uses an FOB device. Enter the required **FOB Device ID** and **FOB Seal ID** fields (if this option is selected). The Caregiver must enter the Device ID each time an EVV is entered. • The **Caregiver with Access to Patient Info via Mobile App** dropdown field contains the names of Caregivers who use the Mobile App and have been configured to view clinical information from it. Select one or more Caregivers to grant them access to the Patient's clinical info.
3	Select the Patient's *Profile* page (from the left nav) and go to the *Address* section.
4	Complete the Patient's demographic information. Multiple Addresses can be entered for a Patient as a GPS-enabled **Address Type** (as seen in the image). Verify that all addresses are accurate, as the system uses these values to validate EVV confirmations. **Patient Profile GPS Enabled Patient Addresses**
5	For other forms of EVV, the Patient Phone Number(s) is used to confirm an EVV. Verify the Phone Number Information on the Patient Profile. **Patient Profile – Patient Phone Number Information** Refer to the Tracking Location Where EVV is Performed section for full details on linking a Patient Phone Number to an EVV method.

Caregiver Setup

Caregivers must enter their **Time & Attendance PIN (Assignment ID)** to verify their identity whenever placing an EVV (using an approved phone). This allows the system to match up their call with the proper visit.

EVVs made via the Mobile App require a **Mobile ID** verification number, issued when a Caregiver creates a profile on the Mobile App. Caregivers must provide this **Mobile ID** to the Agency to link with the system. Once the Agency enters the ID on the Caregiver's **Profile** page, the system recognizes EVVs placed from the Caregiver's Mobile App.
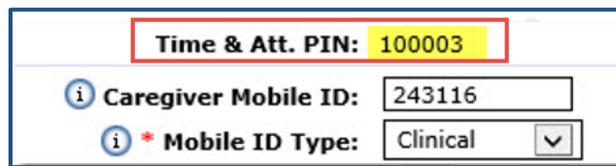
Caregiver PIN and Mobile ID (Assignment ID)

Once the **Caregiver Mobile ID** has been entered, the system requires a **Mobile ID Type**. Select *Clinical* to allow the Caregiver to review the Patient's medical and clinical information if they have been granted access to this information. The Caregiver cannot view any medical or clinical if *Non-Clinical* is selected.

Placing an EVV

EVV may be placed using an approved Patient phone, the HHAeXchange Mobile App, or with an FOB device. This section covers each method of placing an EVV.

Caller ID

When Clocking In or Out by phone, the Caregiver must dial the Provider's Time and Attendance phone number. When the call is placed, the system reviews the number the call is originating from and matches it with an accepted Patient phone number. If the system cannot match the number from the Caller ID, the call is sent to the **Call Maintenance** Exception page.

The following steps provide an example of how a Caregiver performs a Caller ID type of EVV.

Step	Action
1	At the beginning of a shift, the Caregiver uses the approved Patient's phone to dial the Provider's **Time and Attendance** phone number.
2	Enters "1" to Clock In.
3	The system then prompts the Caregiver to enter their **Time and Attendance Pin** (found in the Caregiver Profile).
4	The system confirms the entry and ends the call.
5	At the end of the shift, the Caregiver again uses the approved Patient's Phone to dial the **Time and Attendance** phone number.
6	Enters "2" to Clock Out.
7	The system then prompts the Caregiver to enter their **Time and Attendance Pin** a second time.
8	The system prompts the Caregiver to enter the duties performed for the Visit. The system automatically registers the entry when a recognized **Duty ID** code is entered. If a Duty is refused, the Caregiver enters star "*****" before the **Duty ID** code.
9	After entering all duties, the Caregiver enters "000". The system confirms the entry and ends the call.

Note: In special cases (such as Linked/Mutual cases), the system may prompt for multiple sets of duties. After each set is logged, the Caregiver enters "00" (or "000") to move to the next set.

FOB Device

The **Fixed Object (FOB)** is a small device used for EVV that generates an **8-digit passcode** which must be entered when a Caregiver Clocks In and Out.

In addition to the passcode, the FOB's **Device ID** must be entered to place EVV. The FOB EVV requires a specific **Device ID** and two codes (one for Clock In; another for Clock Out). With this option, Caregivers may place EVV from any phone. Refer to the FOB Process Guide for further information on the FOB device.

The following steps provide an example of how a Caregiver performs an FOB Device type of EVV.

Step	Action
1	The Caregiver activates the FOB at the beginning and end of the Visit, recording the 8-digit passcode each time.
2	The Caregiver calls the Provider's Time and Attendance phone number and presses "3" to indicate "FOB Device" confirmation.
3	The Caregiver presses "3" a second time to indicate "FOB Clock In and Clock Out."
4	As prompted, the Caregiver then enters the following: 1. Enter **Time & Attendance Pin**. 2. Enter the 6-Digit **Device ID**. 3. Enter the 8-Digit Clock In **passcode**. 4. Enter the 8-Digit Clock Out **passcode**. 5. Enter any duties performed (one at a time).
5	With the duties entered, the Caregiver dials "000" to end the call.

Note: FOB confirmations can also be placed from the HHAeXchange Mobile App. Refer to the Mobile App Process Guide for instructions for this process.

Mobile App

The **Mobile App** may be used to place EVV with an FOB device or with the GPS functionality.

The **Mobile ID** is generated when the Caregiver signs up for the Mobile App. This Mobile ID is provided from the Caregiver and entered in the Caregiver Profile in the HHAX system (refer to the Caregiver Setup section above).

HHAX uses Google Maps to determine the GPS coordinates of the address entered in the **Address 1** field. Verify that the address entered for the Patient **Address 1** field (on the Patient *Profile* page) is correct.

*Note: Supplementary information, such as the Patient's apartment number or cross street, may be entered in the **Address 2** field (not used for GPS validation purposes).*

The following steps provide an example of how a Caregiver performs EVV via the Mobile App.

Step	Action
1	Log in to the Mobile App at the beginning of the visit.
2	Select **Today's Schedule** from the main menu and then select the Patient.
3	Select **Clock In**.
4	Select the visit verification method: **GPS** or **Security Token** (FOB) • When the **GPS** function is used to place EVV, the system validates the coordinates of the EVVs point of origin against the coordinates on record for the Patient. If the coordinates of the EVV match the Patient's address or fall within the specified **Tolerance Range**, then the system confirms the visit. • For **FOB**, the Caregiver is prompted to enter the **Device ID** and the 8-digit passcode.
5	At the end of the visit, repeat *Step 1, Step 2*, *Step 3*, and *Step 4*, with the addendum that **Clock Out** is selected on *Step 3*.
6	Lastly, enter the POC duties performed and select *Save* to finalize.

Refer to the Mobile App Process Guide for further information when placing EVV via the Mobile App.

- Refer to the ***Alternate EVV System Verification Configuration and Reporting*** section of the guide
  for additional verification alternatives.

Caregiver Places a Successful EVV

When a Caregiver places a **Successful EVV**, the system immediately updates the visit to reflect the verification. Successful EVV confirmations can be reviewed in several areas of the system as outlined below.

Option 1

On the Patient's *Calendar* page, confirmation times display in the Calendar Cell (as illustrated in the following image).
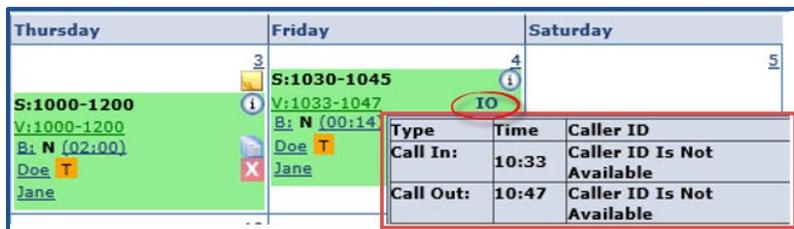
In and Out Times

*Note: The **Caller ID** is not available in the image above because the EVV was placed using the Mobile App.*

*The **I** and **O** icons in the image above (Friday the 4th) mark accepted EVVs for the In and/or Out time. Hovering the cursor over the icon opens a pop-up containing the precise times of the EVVs, as well as the Caller ID.*

*For manually confirmed visit times (start/end), the times are displayed without the **I** and **O** icons.*

Option 2

In the *Visit Info* tab of the visit window, specific EVV confirmation details and sources are reviewed. EVV confirmations display in green under the **Visit Start Time** and **Visit End Time** fields. As illustrated in the image below, a small icon to the left of the EVV confirmations indicates that the GPS method was used to place the EVV.
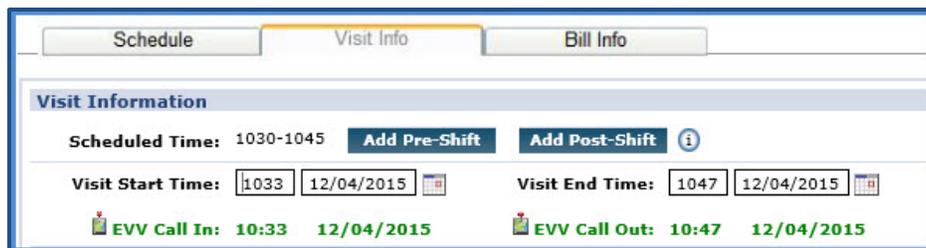
GPS Confirmation on the Visit Info Tab

At the bottom of the *Visit Info* tab, the *Call History* section provides details of the EVV history placed for the visit.

Call History

EVV Time	EVV Type	Status	Duration	Tasks Performed	CallerID	Linked By	Linked Date	Unlink
12/04/2015 10:47 AM	GPS Out (Doe Jane)	Success	0	5	N/A	jfranqui	12/04/2015 12:25 PM	Unlink Call
12/04/2015 10:32 AM	GPS In (Doe Jane)	Linked Manually	0		N/A	jfranqui	12/04/2015 12:24 PM	Unlink Call
12/04/2015 10:32 AM	Verification	Auto Verification (Call Maintenance)	0		N/A	jfranqui	12/04/2015 12:24 PM	

Call History on the Visit Info Tab

Caregiver Places an Unsuccessful EVV

When a Caregiver places an **Unsuccessful EVV**, the system rejects the confirmation and sends it to the **Call Dashboard**. An Unsuccessful EVV may be the result of any of the following:

- The Caregiver using an unauthorized phone to place the EVV.

- The Caregiver is outside the tolerance range when placing a GPS EVV.

- The Caregiver places the EVV outside the unbalanced tolerance window.

There are only two outcomes for calls sent to the **Call Dashboard:**

1. **Link** calls that were made but never applied to a visit.

2. **Reject** calls that cannot be matched to any visits.

The Call Dashboard

The **Call Dashboard** is used to capture and track EVV failures and rejections (as described in the section above).

There are only two outcomes for calls sent to the **Call Dashboard**:

- **Link** calls that were made but never applied to a visit.
- **Reject** calls that cannot be matched to any visits.

This section covers the **Call Dashboard**, linking calls, and rejecting calls pages.

Note: This process guide provides the general steps to review exceptions, link calls, and reject calls. Managing individual exceptions and polices is the responsibility of each individual Agency. This guide does not cover steps for managing individual exceptions.

Call Maintenance

The **Call Maintenance** is a real-time hub for tracking and reviewing Caregiver time and attendance. In this hub, EVV that cannot be matched to a visit is reviewed and held. All EVV held on this page is assigned a **Status**, such as *Call from Caregiver Number* or *Phone Number Not Found*, which corresponds to the reason the EVV was held. Complete the following steps to review EVV "held" on the **Call Maintenance** page.

Step	Action
1	Navigate to ***Visit > Call Dashboard*** to access the *Call Maintenance* page.
2	Click ***Search*** to access the following: • all "held" EVV on the *Call Maintenance* page (leaving search filters blank; or • specific EVV based on search criteria using the available filters such as **Status**, **Coordinator**, or **From/To Date**.

Step	Action
	 Call Maintenance Filters
3	Results are generated. Each line item is an EVV that could not be "matched" with a scheduled visit. Items in each row have three main components, as highlighted in the image, and described below. **Unlinked Calls** Columns highlighted in **RED** indicate the Caregiver placing the confirmation. Information based on the Time and Attendance PIN of the Caregiver placing the EVV confirmation. Columns highlighted in **BLUE** indicate **Call details** captured by the EVV including the Patient, Call Date and Time, Call Type (In or Out), and the Caller ID used. Columns highlighted in **ORANGE** indicate the **reason** why the Caregiver's EVV was not automatically linked to a scheduled visit.
4	Click on the **Caregiver Name** (link) to view the **Caregiver's** scheduled visits for the day. Visit details display in a popup (as illustrated). **Caregiver Schedule**
5	Click the number in the **Caller ID** column to view the **Patient's** scheduled visits for the day (as illustrated.
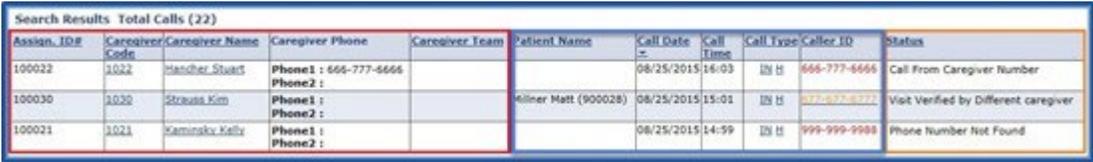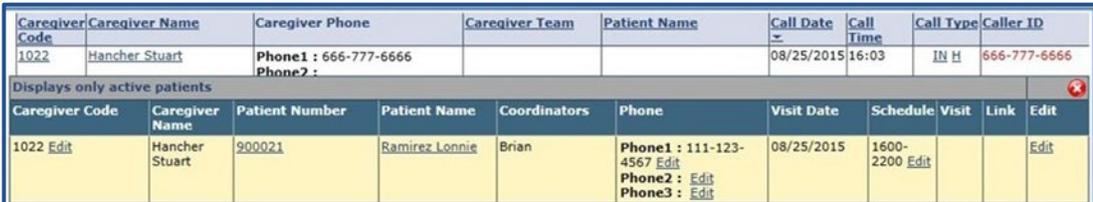
Step	Action

Patient Schedules

Linking EVV

On the **Call Maintenance** page, EVV may be linked to a visit if enough information is available to determine the origin of the call and the associated visit. When linked, the EVV is removed from the *Call Maintenance* page. The following steps demonstrate an example of linking an EVV.

In the following example, Caregiver Alan Anderson places an EVV with a Caller ID of **999-999-9999** for a visit on 8/24. The **Status** of *Phone Number Not Found* indicates that no Patient has this number listed on their profile.

Assign. ID#	Caregiver Code	Caregiver Name	Patient Name	Call Date ▾	Call Time	Call Type	Caller ID	Status	Action
100001	1001	Anderson Alan		08/24/2015	07:55	IN H	999-999-9999	Phone Number Not Found	Reject

Phone Number Not Found Status

Note: HHAX recommends consulting an Agency's supervisor for best practices policies before linking an *Unsuccessful EVV.*

Step	Action
1	Click on the **Caregiver Name** column to access the Caregiver schedule details.
2	The pop-up window opens. Confirm that the Caregiver was scheduled for a visit on 8/24. As illustrated in the image, Caregiver Alan has a visit on 8/24. However, the Patient's approved phone number is **987-654-3210**. **Caregiver Schedule: Visit Details** *Note: The Link option is not available to link this call.*
3	Upon determining that the Caller ID number is a legitimate second phone line for the Patient, click the **Edit** link (**Phone2**) under the **Phone** column to edit the phone number for the Patient. Click the **Update** link to save the change. **Edit Phone Number**

Step	Action
4	The Caller ID now matches a number on the Patient's Profile. The status on the *Call Maintenance* page changes to **Issue Fixed: Linkable Call**, allowing the EVV to be linked. Click <u>Link</u> to link the EVV with the visit. The exception is removed from the *Call Maintenance* page. **Link Option Available**

Patient with Multiple Addresses

To see a Patient's Address GPS coordinates in the *Call Maintenance* page, click on the GPS icon to view the EVV location. The popup window shows the multiple locations. This applies to the various Call Maintenance pages (such as Rejected Calls).

Patient Address: GPS Coordinates

In support of the Multiple Address feature, select the **GPS from Unapproved Patient Address** exception on the *Call Maintenance* page to search for such visits.

GPS Unapproved Patient Address Exception

EVV Confirmation from Multiple Patient Address

The following example illustrates how the system validates a GPS confirmation for Patient's with multiple "GPS Allowed" addresses on record: EVV confirmation is possible from multiple locations.

Address 1 – Set as Allow GPS

Address 2 – Set as Allow GPS

Address 3 – Set to NOT Allow GPS

- GPS confirmation received within range of all three addresses; Result: Valid GPS confirmation
- GPS confirmation received within range of Address 2 + 3; Result: Valid GPS confirmation
- GPS confirmation received within range of only Address 3; Result: Call Maintenance exception for "GPS from Unapproved Patient Address"

Editing GPS Coordinates

At times, the coordinates attributed to an address by Google Maps do not properly reflect the actual coordinates of the Patient's home. This may be common for Patients who live in rural addresses or in large apartment complexes in a city.

To address this issue, users may recalculate the coordinates of a Patient's address using the coordinates associated with GPS based EVV that is being held on *Call Maintenance*. This allows Agencies to correct

the coordinates attributed to a Google address by replacing them with the more accurate EVV coordinates.

Note that when the coordinates of a Patient's address are changed, all future EVV placed via GPS uses the updated coordinates to complete the confirmation. Coordinate updates should only be done for GPS based EVV that routinely ends up on the *Call Maintenance* page with a **Status** of *GPS Signal Out of Range* for a specific Patient. Complete the following steps to update Google coordinates for a Patient's address.

Step	Action
1	Click the GPS icon under the **Status** column of the held EVV. **Call Maintenance: GPS Signal Out of Range Status**
2	The *Edit Member GPS Coordinates* window opens, displaying the coordinates of the EVV using Google Maps. The map contains a red marker (A), which indicates the current Google Map coordinates associated with the Member's address and a blue marker (B), which indicates the Caregiver's coordinates at the time the EVV was placed. The **Latitude** and **Longitude** fields (above the map) indicate the coordinates of where the EVV was placed. 1) The Member's Primary Address is selected by default. If multiple addresses are on record, then select the applicable address from the dropdown. 2) Select the ***Save Coordinates*** button at the bottom of the window to overwrite the Google coordinates with the EVV coordinates.
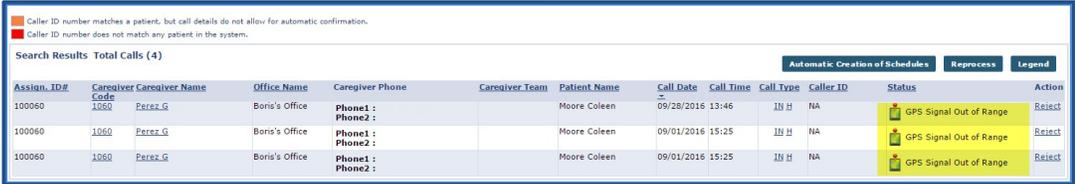
Step	Action
	Google Coordinates (Red Marker) and EVV Coordinates (Blue Marker) *Note: The **Latitude** and **Longitude** values in this window may not be edited; these represent EVV data received by HHAX.*
3	A confirmation message opens alerting the user that all future GPS-based EVV for the Patient will be authenticated using the updated coordinates. Click the **OK** button to confirm and save.
4	On the *Call Maintenance* page, click the **Search** button to prompt the system to reevaluate the previously held EVV. With the updated coordinates reflecting the Patient's address accurately, the EVV is processed and linked properly to the corresponding visit(s). **EVV Reprocessed**

Rejecting EVV

An EVV that cannot be linked can be rejected. A rejected EVV is moved from the *Call Maintenance* page to the *Rejected Calls* page. The following is an example of rejecting an Unsuccessful EVV.

Caregiver Peter Capelli has placed a confirmation. The **Status** of *Caller ID Not Available* indicates the Caller ID was blocked.

Caller ID Not Available

Step	Action
1	Click on Peter's name under the **Caregiver Name** column to confirm the visit on 8/24. This opens a menu containing additional schedule information. **Caregiver Schedule** In this example, the visit cannot be linked because the system could not verify the Caller ID. Therefore, there is no way to confirm if the EVV was made from the Patient's home. Moreover, without a number to save, the **Link** option does not appear.
2	Click on the **Edit** link to open the visit details and select the Timesheet Required checkbox. To verify this visit, the Caregiver must submit a physical, signed timesheet to confirm the shift. **Timesheet Required** Once the Caregiver hands in the Timesheet, approval must be manually entered in the system by selecting the **Timesheet Approved** checkbox on the Visit window.
3	On the *Call Maintenance* page, click the **Reject** hyperlink under the **Action** column. **Reject EVV Link**

Step	Action
4	Click **OK** to confirm the rejection.
5	After confirming, the EVV is removed from the *Call Maintenance* page and placed on the *Rejected Calls* tab of the Call Dashboard.

Reversing Rejected Calls

Rejected Calls may be reversed if an EVV was mistakenly rejected. Reversing a rejected call sends it back to the *Call Maintenance* page, where the EVV can be linked to the appropriate visit. Complete the following steps to reverse a rejection in the system.

Step	Action
1	Navigate to the *Rejected Calls* page and search for the applicable rejected call.
2	In the results, locate the call and click the **Information bubble** for details. **Rejected Calls**
3	The *Call Rejection Details* popup opens containing details such as who rejected the EVV, date and time of rejection, and a **Reverse Call Rejection** link. Click on the link to continue. **Call Rejection Details Popup**
4	Click **Yes** to confirm the action.
5	The EVV is removed from the *Rejected Calls* page and routed back to *Call Maintenance*. **Call placed back on Call Maintenance Page**
6	Link the EVV to the appropriate visit.
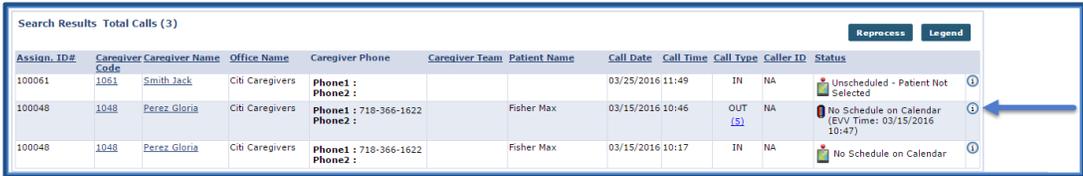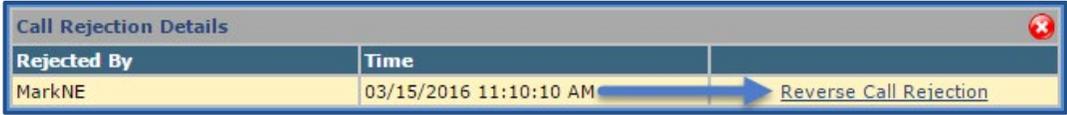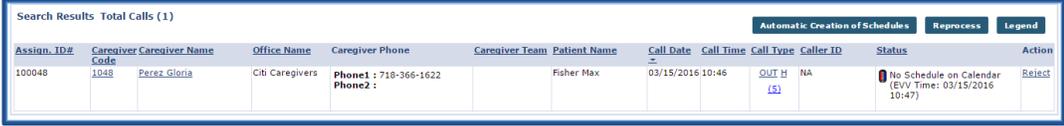
Note: An EVV can be rejected and reversed multiple times. The record in the Call Rejection Details popup maintains a record of each rejection.

No Confirmations Received

When a visit is missing one or both EVV confirmations, it is held in the **Missed In, Missed Out,** or **Missed Call** buckets (as described in the table below the image). Visits are held on these pages for a day or two, or until the applicable time(s) is entered.

(21)   **(11)**   **(15)**
Missed In   Missed Out   Missed Call

Missed In/Out/Call

Note: *The number in the parenthesis represents the number of visits held in each of these pages.*

Visits held in…	Because…
Missed In	an EVV is not received within the set **Unbalanced Tolerance** at the *start* of a visit. Visits remain on this page for one day, or until a **Visit Start Time** is entered.
Missed Out	an EVV is received for the start of a visit, but not within the **Unbalanced Tolerance** range at the end. Visits remain on this page for two days or until a **Visit End Time** is entered.
Missed Call	there is no acceptable EVV for either the start or end time of a visit. Visits remain on this page for two days or until the **Visit Start Time** and **Visit End Time** is entered.

Confirming Visits

Visits sent to the **Missed In/Out/Call** pages can be confirmed by linking EVVs found on the *Call Maintenance* page or manually adjusted. The following example demonstrates how to correct a Visit that is missing a **Missed Out**.

Step	Action
1	Navigate to ***Visit > Call Dashboard > Missed Out*** and generate a search for held visits.
2	In the search results, each line item contains relevant visit info including a ***Find Calls*** button. Select the ***Find Calls*** button to search for EVVs on the **Call Maintenance** page to link to the visit.

Step	Action
	 Visit Details
3	If the EVV matches the visit information, click on **Link** to link the EVV to the visit. If no call matches, click the *edit* icon to navigate to the visit to manually edit. **Linking EVV** *Note: A manual confirmation should only be completed once the Agency has a Timesheet verifying the Visit End Time.*
4	On the *Visit Info* tab, manually update the necessary confirmation details based on the Agency's internal policies. Select the **New Reason** from the required field. **Manual Confirmation** *Note: Depending on the **New Reason** selected other fields may become required (such as **Action Taken** or **New Note**). Required fields are denoted with a red asterisk.*
5	As best-practice, select the entity who verified the visit as well as the date and time of verification. To prevent billing issues, select the **Timesheet Required** checkbox followed by the **Timesheet Approved** checkbox once the physical timesheet is submitted. **Audit Information**

Missed/Deleted Visits

Periodically, a visit is incorrectly scheduled, or a service is not provided for some reason. Shifts that do not take place are either marked as a Missed Visit or deleted from the system. Complete the following steps to delete a visit or mark it as a Missed Visit.

Note: Ensure to review the Agency's internal policies regarding deleting or editing visits.

Step	Action
1	To mark a visit as missed, use the *edit* icon to open the visit window and select **Missed Visit**. To delete the visit entirely, click on the *delete* icon next to the edit icon. **Edit or Delete Visit**
2	For a <u>missed</u> visit, select the **Missed Visit** checkbox and complete any required fields on the *Visit Info* tab. Click the *Save* button to save changes. **Missed Visit** For a <u>deleted</u> visit, select the required **Reason** for deletion from the dropdown and add any pertinent notes. Click the *Delete* button. **Delete Visit**
3	When a visit is marked as missed, the **Visit Start** and **End Times** lock. Before the updated visit information can be saved, the **Missed Visit Reason**, **Action Taken**, and **Note** must be entered to document the reason for the Missed Visit.

Step	Action
	  Missed Visit

EVV-Based Visit Scheduling and Confirmation

If a Patient requires immediate service outside of their normal schedule, then EVV can be used to schedule and confirm visits, as follows:

Option	Description (How it works)
Automatic Visit Creation Based on EVV Confirmation	Identify incoming EVV placed for Patients under a specific **Contract** and using the confirmation details to schedule and confirm the visit.
Automatic Creation of Schedules	Review all EVV received by the system that could not be matched to scheduled visits and use to create partially or fully confirmed visits.

Automatic Visit Creation for Contracts

The following criteria must be met to use the **Automatic Visit Creation** functionality:

- The **Automatic Visit Creation Based on EVV Confirmation** field selected on the *Contract Setup* page.
- Patients receiving service under the associated Contract must have a **Default Service Code**.
- The discipline(s) providing service to the Patient has a **Default Pay Code**.

Additionally, Caregivers *must* place the EVV (both Clock In and Clock Out) from a single, verified, Patient phone number. If either call ends up on *Call Maintenance*, the system is not able to generate/confirm the visit.

Contract Setup

Follow the steps below to complete the Contract Setup required to permit EVV-based visit scheduling and confirmation for a specific **Contract**.

Step	Action
1	Navigate to **Admin > Contract Setup > Contract Search** and select a Contract.
2	Select the *Scheduling / Confirmation* tab at the top of the page and scroll to the *Scheduling Configuration* section.

3	In the *Scheduling Configuration* section, select the **Automatic Visit Creation Based on EVV Confirmation** checkbox. Click the *Save* button to finalize. **Automatic Visit Creation Based on EVV**

Going forward, the system uses EVV from visits scheduled under this **Contract** to create and confirm visits.

Default Service Code

For the system to automatically generate a visit based on EVV information, all Patients receiving service under the associated Contract must have a **Default Service Code**. Complete the following steps to enter a Patient's **Default Service Code**.

Step	Action
1	Navigate to *Patient > Patient Search* and select a Patient.
2	In the Patient Profile, open the *Contracts* page and check for the **Service Code**. **Patient Contract Page – Service Code**
3	If no **Service Code** is associated with the Contract, click the **Edit** link under the *Service Code* column and select a code.

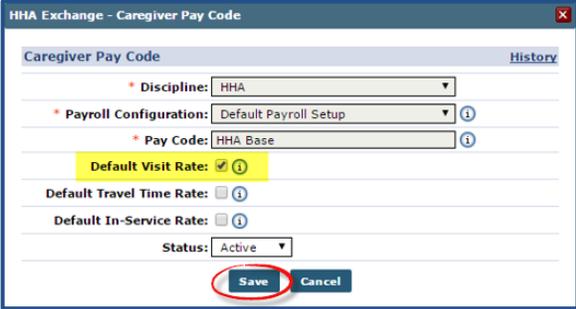| Step	Action
	 Select Default Service Code
4	Once a **Service Code** is selected, click the **Update** link. The Patient now has a **Default Service Code** for the Contract. **Save Default Service Code**

Note: Automatic Visit Creation may be deactivated at any time for a specific Patient by navigating to Patient > Patient Profile > General and selecting the Disable Automatic Visit Creation Based on EVV Confirmation checkbox.

Disable Visit Creation

Default Pay Code

For the system to apply a **Pay Code** to the visit, the discipline(s) providing service for the Patient needs a **Default Pay Code**. Complete the following steps to apply.

Step	Action
1	Navigate to *Admin > Reference Table Management*.

Step	Action
2	Select the *Caregiver Pay Code* **Reference Table** dropdown. **Reference Table - Caregiver Pay Code**
3	Click the **Search** button to view the existing Pay Codes. To add a new Pay Code, click the ***Add*** button.
4	The *Caregiver Pay Code* window opens. Complete the required fields (denoted with red asterisks). Select the **Default Visit Rate** checkbox. **Set Default Visit Rate**
5	Click the ***Save*** button to finalize. Moving forward, the system automatically applies this Pay Code to visits scheduled with the associated discipline.

Automatic Creation of Schedules Function

Refer to the [Automatic Creation of Schedules Job Aid](#) for details and instructions.

Manually Confirming Visits

Visits that cannot be verified using EVV confirmation must be manually entered. Manual confirmation can be completed in bulk using the following functions: **Confirm Timesheet**, **Confirm Visits**, and **Edit Services**. Each of these functions are covered in the sections to follow.

Confirm Timesheet Function

The **Confirm Timesheet** function is used to enter the schedule, confirmation, and duty information for visits confirmed via paper timesheets. Moreover, the **Reason, Action Taken,** and **Note** fields must be completed (required) when manually updating a visit for compliance purposes.

To search for visits using this function, the **Office**, **Caregiver**, and a **Week-Ending Date** must be specified; the **Patient** field is optional.

Complete the following steps when using the Confirm Timesheet function.

Step	Action
1	Navigate to *Action > Confirm Timesheet*.
2	Select the **Office**, **Caregiver Name/Code**, and **Week-Ending Date** (required) fields. Select the **Patient**, if applicable (optional). Click the *Go* button to generate visit information for the selected criteria. **Confirm Timesheet Search Fields**
3	The system displays visit information for the Caregiver for the specified week. Complete the **Schedule / Temp, Override / Conf,** and **TS Req/App** fields to confirm or edit the Scheduled Visit Times, the actual Visit Times (according to the Timesheet) and approve the Timesheet.

Step	Action
	 Search Results *Note: If the Caregiver did not have a visit on a certain day, or the visit is in the future, the fields are unavailable. Use the **Previous Week** and **Next Week** icons above the search results to navigate to other Caregiver visits (worked by or scheduled for).*
4	Click on the **Duties** link at the bottom of the page to enter POC Duties for the applicable visit for the selected week. Duties may only be applied to scheduled visits. Click the left-side checkbox to apply duties for all editable visits or click on individual days to specify which duties were performed (or refused) individually. **Duty List** *Note: Duties that are part of the Patient Plan of Care display in **green**. Those entered by the Caregiver via EVV display in **blue**.*
5	Once all time and duty information is entered, click the **Save** button to apply the changes.
6	To ensure the visit(s) is confirmed, navigate to either the **Patient** or **Caregiver Calendar** and review the relevant dates.

Step	Action
	Visit Confirmed

Confirm Visits Function

The **Confirm Visit** function is used to manually confirm visits in bulk. This function displays all visits applicable to the search parameters and is strictly for confirming visits only. In essence, one cannot confirm a Timesheet or enter POC Duties from this page.

*Note: Use the **Confirm Timesheet** page when a visit requires advanced verification.*

Complete the following steps when using the Confirm Visits function.

Step	Action
1	Navigate to **Action > Confirm Visits** and specify a date range using the **From/To Date** fields. The **Display** value selected dictates the information to view in the search results. Once search parameters are chosen, click the **Go** button. **Display Values**
2	As illustrated in the image below, the **Display** value selected is *Visit*. The search results provide information available on the Visit tab as well as any open fields. Enter or edit the applicable information. When values for these fields are entered, the system highlights the EVV in orange indicating that there is sufficient information to generate a visit. Select the checkbox in the left-most column for records where all the visit information is already populated. Doing so does not highlight the EVV but includes it in the visit processing. **Display: Visit**
3	Once complete, click the **Save** button to update all selected records in bulk.

Edit Services Function

The **Edit Services** function is used to divide a single visit into multiple sections, each with an individual Service Code. This is useful when each service provided during a visit must be billed separately. Each new visit (or division of the initial visit) can be confirmed from this page.

Complete the following steps to use the Edit Services function.

Step	Action
1	Navigate to *Visit > Edit Services*.
2	Specify the **Office** and **Week Ending Date** (required) fields. Enter either a **Patient** or **Caregiver** to update (optional). Click *Search* to continue. **Search Filters**
3	In the search results, click on the **Add** button (under the **Date** column) to create a new visit or division. **Edit Services**
4	Enter a new **Schedule Time**, **Confirmation**, **Service Code**, and **Timesheet** for the new visit.
5	Once all changes have been made, click the *Save* button to update information in bulk for all adjusted visits. Changes may be reviewed on the Patient's Calendar. as illustrated in the following image.
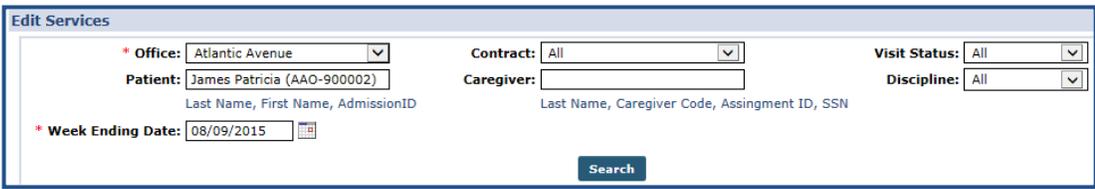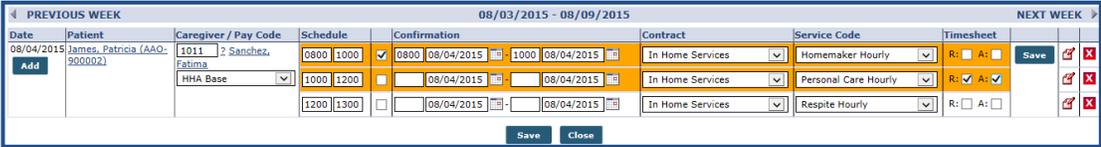
Step	Action
	S:1000-1100 ⓘ V:1000-1100 B: **N** (01:00) Abreu Alex **S:1100-1200** ⓘ V:1100-1200 B: **N** (01:00) Abreu Alex **S:1200-1400** ⓘ V:1200-1400 B: **N** (02:00) Abreu Alex **Divided Visit**

Permissions for Linking EVV

The following permissions allow Providers to manage EVV linking to the correct modality. These three permissions are also used to control specific **Status** values in the Call Maintenance function to reduce the number of EVV on the Call Dashboard defined as Unknown.

- **Allow Linking Unrecognized Number** controls linking unrecognized numbers. When activated, users can link EVV with and unrecognized number to a visit. This permission controls the following **Status** values:
  - Phone Number not Found
  - Call ID not Available

- **Allow Linking Unrecognized FOB** links unrecognized FOBs when EVV is placed using IVR or the Mobile App. When activated, users can link EVV with an unrecognized FOB to a visit. This permission controls the following **Status** values:
  - Invalid FOB Passcode
  - Expired FOB Passcode

- **Allow Linking Unrecognized GPS** links unrecognized GPS, when EVV is placed via the Mobile App. When activated, users can link EVV even if the GPS does not correspond to a Patient Address on file. This permission controls the following Status values:
  - GPS Signal Out of Range

These permissions are managed via the User Management functionality. To enable or disable these permissions, navigate to the *Edit Roles* page (***Admin > User Management > Edit Roles***). Select *Visit* from the **Section** dropdown field and the applicable **Roles**. These permissions are located under the Call Dashboard section, as seen in the following image.

Permissions: Allow Linking Unrecognized Number/FOB/GPS

Tracking Location Where EVV is Performed

To accommodate Electronic Visit Verification (EVV) state mandates required by the Cures Act, the system has been updated to capture EVV at the location where services are performed. Providers can associate a Patient's phone number, FOB, or Beacon device to a specific address on the Patient Profile to indicate where EVV is captured. In turn, the address is saved upon visit confirmation.

Note: *Not valid for "Billing Only" addresses.*

Associate Patient Address with Phone Number

To associate a Patient address with a phone number, navigate to the applicable *Patient Profile* page (**Patient > Profile**) and click the **Edit** button. On the *Phone Number Information* section, **Phone Location** fields have been added under each **Phone** field (**Home Phone**, **Phone 2**, and **Phone 3**). To connect the phone to an address, select the applicable address (previously entered in the *Address* section) from the **Phone Location** dropdown (as seen in the image below).

Associating a Phone Number with an Address

Note that a Patient Address can be associated to multiple phone numbers; however, each phone number can only be associated to one address. To clear out an address association, select the "Select" value from the dropdown and save.

Any Patient **Phone Numbers** left unselected default to the **Primary** address on record on the Patient Profile.

Once saved, the **Phone Location** fields are populated with associated addresses, viewed on the *Patient Profile* page (as illustrated in the image below).

Associate Phone Numbers with Addresses

Updates to Patient Address Types

Home and *Community* options have been added to **Address Types** to allow further categorization of the Patient address. Although **Address Types** is a multi-select column, the options of *Home* and *Community* cannot be selected together. In essence, a Patient address cannot be both Home and Community.

If **Address Type** is unselected for any address entered, then the system defaults to the **Home** value capturing where the service was performed.

Home and Community Address Types
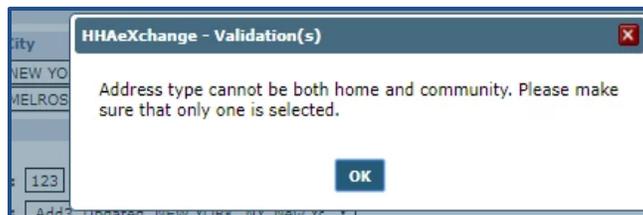
Address Type Validation Error

Note: For Linked Contracts, Payer permission must be granted to the Provider to edit Address fields.

Associating a Patient Address with a FOB or Beacon Device

FOB Device

If a Patient has been set up with a FOB device, then the Patient Addresses can be associated to the FOB device in the *Patient General* page (*Patient > General*). An **FOB Location** field has been added to

associate an address to the device. On the **FOB Location** dropdown, select the applicable address (as entered in the *Patient Profile* page).

Only one address can be associated with the FOB device.

FOB Location: Associated Address

Once saved, the **FOB Location** field is populated with the associated address, viewed on the *Patient General* page (as illustrated in the image below).

Associated Address with FOB Device

Beacon Device

If a Patient has been set up with a Beacon device, then the Patient Addresses can be associated to the Beacon device in the *Patient General* page (**Patient > General**). A **Beacon Location** field has been added to associate an address to the device. On the **Beacon Location** dropdown, select the applicable address (as entered in the *Patient Profile* page).

Only one address can be associated with the Beacon device.

Associating a Beacon to Patient Address

Once saved, the **Beacon Location** field is populated with the associated address, viewed on the *Patient General* page (as illustrated in the image below).

Associated Address with Beacon Device

Updating or Deleting an Address

When an address is updated or removed from the Patient Profile page, the system removes the association with the applicable FOB or Beacon device.

Manually Linking Calls

Call Maintenance

The system captures the associated Patient address when a Call In or Call Out is made for a Patient visit. If an error occurs during this process, then the call goes to the Call Dashboard to be resolved. Use the **Link** option under the **Call Type** column on the Call Maintenance screen to store the confirmed EVV and the associated Patient address (as illustrated in the image below). The system stores the address according to the EVV modality (Phone, FOB, GPS) used to Call In or Out.

Linking on the Call Dashboard

Visit Info Tab

The same occurs on the _Visit Info_ tab. Use the **_Link Calls_** button (to the right of the **Visit End Time** field; (as seen in the following image) to link _Call In_ and/or _Call Out_. Once linked, the system stores the associated Patient address according to the EVV modality (Phone, FOB, GPS) used.

Linking via Visit Info Tab

Viewing a Stored Patient Address

After a call is successfully linked, the address (if available) is stored and visible in the _Visit Info_ tab of each visit along with the EVV ID used for the confirmation. Hover over the telephone icon in respective **EVV Call In** or **EVV Call Out** fields to view the stored address (as seen in the following image).
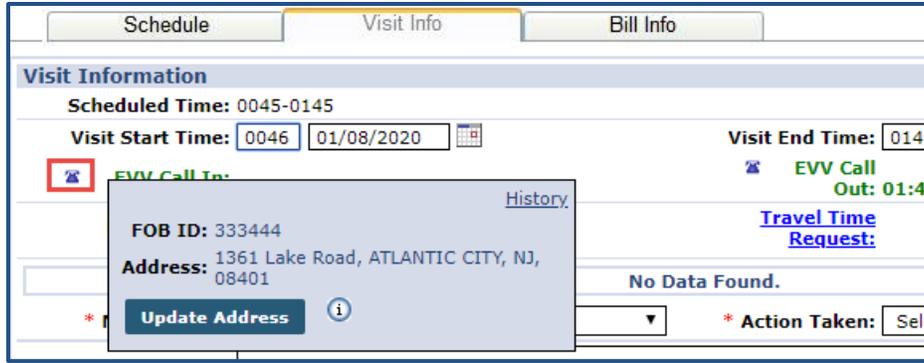
Viewing a Stored Address in the Visit Info Tab

Note: In rare occasions, (however, possible) a Patient visit may start in one location and end in another.

The absence of the telephone icon may indicate that the visit is either manually confirmed or not yet confirmed.

At times, an **EVV ID** and confirmation time is present for a visit without an address. This indicates that there is no address associated with the EVV method used (Phone, FOB, or Beacon). In this case, an address can be associated and then the visit can be manually updated as described below.

Manually Updating a Stored Patient Address

Stored addresses may need to be manually updated if the address associated with an EVV method is incorrect (and stored for a confirmed visit); or no address is associated to the EVV method used (resulting in a missing address).

To manually update a stored Patient Address, navigate to the *Patient Profile* page (**Patient > Profile**) and click on the *Edit* button. On the *Phone Number Information* section, select the applicable **Phone** field and the correct stored address.
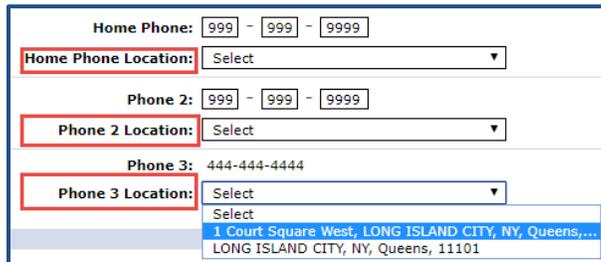
To associate the correct address to an EVV Method, navigate to the *Patient General* page (*Patient > General*). From the **FOB Location** and/or **Beacon Location** field dropdown, select the correct stored address.

Once the proper address is associated, navigate to the applicable *Visit Info* tab and hover over the telephone icon to access the confirmed address window. Click on the **Update Address** button. HHAX finds the address matching the **EVV ID** used for confirmation.

*Note: Stored addresses can also be removed using the **Update Address** button.*

A confirmation window opens to confirm the address association. Click **OK** to refresh and store the address for the visit.

If the address is incorrect or missing for the Call IN, it is likely incorrect or missing for the Call OUT and vice-versa. Be sure to check both the **EVV Call In** address and **EVV Call Out** address for accuracy.

Service Location Edits (Cures Act Requirements)

The Cures Act requires that the service location for a visit be accurately captured/recorded in the system to be compliant. When a visit is confirmed, this information is ultimately sent to the Payer and Aggregation applications. Typically, editing the service location (address) for a particular visit may not be permissible for Providers managing certain Linked Contracts; therefore, hindering this compliance requirement.

The system has been updated to allow Providers to edit the service location directly on the *Visit Info* tab for the affected visit. This correction can be completed for Clock In or Clock Out, as pictured in the following image.

To edit, click on the phone icon (☎) to the left of the confirmed EVV (in **green** font) in the *Visit Info* tab. A popup screen appears displaying the details captured in the initial EVV. Click on the *Edit* button on the popup screen.
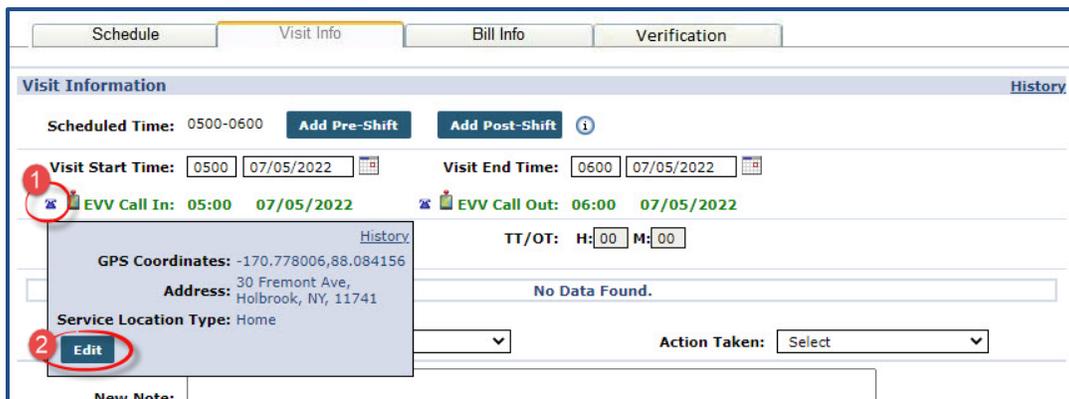
Visit Info Tab: EVV Information

The *Edit EVV Information* window opens. In the image below, the **Service Location Address** is selected as *Other* opening fields to complete. Edit the necessary information to include the required fields denoted with a red asterisk. Click *Save* to finalize.

Edit EVV Information Window

Once saved, the change appears as a Note in the *Visit Info* tab, as seen in the following image.

Visit Info Note: Service Location Change

Patient Voice Verification on IVR Clock Out

The **Alternate EVV Verification Workflow** feature includes the IVR application allowing an Agency to request capturing a Patient's Voice Verification during Clock Out. This feature (introduced as a Mobile App***** feature) allows Providers to use an alternate EVV workflow to achieve state-required compliance (such as when Patient Signature and/or Patient Voice Recording is required to verify visit details).

Both the IVR and Mobile EVV functionality for the **Alternate EVV Workflow** is enabled in the *Edit Office* page (***Admin > Office Setup > Edit Office***) in the *Mobile* section. To enable, select the **Enable Alternate EVV Workflow** checkbox. Once the **Enable Alternate EVV Workflow** checkbox is selected, the following options become available to select:

- the **Verification Order** dropdown field only applies to the Mobile App***** functionality. The IVR system ignores this setting and always uses **Voice Recording** to capture the **Patient's Signature**; and

- the **Require Timesheet if EVV linked to Visit w/o verification** checkbox to require a Timesheet from the Caregiver if a Patient does not verify the visit.
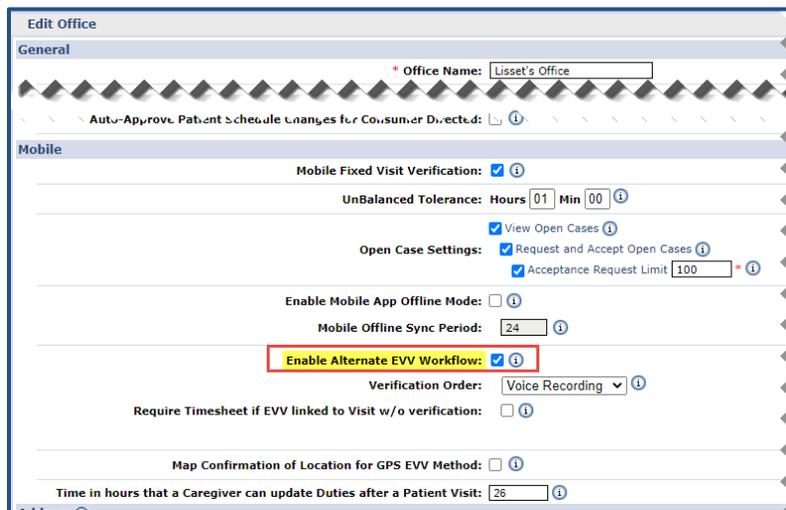
Edit Office: Enable Alternate EVV Workflow

*Refer to the [Mobile App (Agency) Process Guide](#) for details specific on the Mobile App functionality.

Unsupported Workflows

The following features are not available for the Alternate EVV Workflow functionality:

- FOB
- Consecutive Shifts
- Consecutive Shifts for Multi-Service Patient
- Consecutive Shifts for Linked Patients
- Cluster Calls
- Mutual Shift

Alternate EVV Workflows

The Alternate EVV Workflow for IVR differs significantly from existing Clock-Outs in that the Caregiver initiates the confirmation then hands the phone over to the Patient for him/her to provide responses. The following table provides the steps in the EVV Alternate Workflow IVR Clock-Out process, describing how information is captured to include the type of service, duration, and voice confirmation by the Patient.

EVV Alternative Workflow: IVR Clock-Out Steps

Step	Action	Description
1	Initiation of the Alternate IVR Workflow	The Caregiver enters all duties as customary and then presses **000** to proceed to the Voice Verification portion of the call.
2	Caregiver Service Verification	The Caregiver hears the name of the discipline for the visit. The Caregiver _confirms_ or _denies_ that the scheduled Discipline was provided during the visit by pressing **1** for _**Yes**_ or **0** for _**No**_. *Note: If there is no matching visit for the Clock Out, then the system does not present the Caregiver with the visit Discipline and bypasses this portion of the confirmation.*

Step	Action	Description
3	**Hand Phone to Patient**	After confirming (**1** for *Yes*) or denying (**0** for *No*) the service performed, the Caregiver continues to indicate whether the Patient can perform the verification by pressing **1** for *Yes* or **0** for *No*. • If <u>Yes</u>, then the Caregiver hands the phone to the Patient to continue the verification process. The Patient can then confirm the accuracy of the service performed. The system presents the Patient with visit's Discipline, where the Patient presses **1 (Yes)** to <u>confirm</u> or **0 (No)** to <u>deny</u>. • If <u>No</u>, then the Caregiver indicates that the Patient is not able to confirm and the call ends.
4	**Duration Verification**	The Patient is then prompted to confirm (**1** for **Yes**) or deny (**0** for **No**) the Start Time, End Time, and Visit Duration. *Note: If there is no matching visit for the Clock Out, or if a corresponding Clock-In cannot be identified, then the system does not present the visit start time or duration for the Patient to confirm and this portion of the confirmation is bypassed.*
5	**Voice Verification**	The Patient is then prompted to verbally record his/her name and the Date of Service. After recording, the Patient presses **1** to proceed or **0** to hear the recording again. To re-record, press the ***** key. *Note: The Patient can provide a voice confirmation regardless of the system's ability to match a visit or a Clock-In.*
6	**End of the IVR Call Flow**	After completing the voice verification portion of the call, the system automatically ends the Clock Out.

End to End Call Flow

The following table provides the chronical steps heard on the IVR call.

Step	Action	What the Caregiver/Patient hears…
1	**Caregiver calls the IVR line and presses 2 to Call Out.**	*Welcome to HHAeXchange. Press 1 for call in. Press 2 for call out.*

| Step	Action	What the Caregiver/Patient hears…
2	Caregiver enters and confirms their Assignment ID	Enter your Assignment ID. You have entered [Time and Attendance PIN entered by Caregiver]. If it is correct, press 1 or press 0 to reenter.
3	The Caregiver records all duties performed	Enter Duty ID. Next Duty ID (Continue until complete, see next step)
4	The Caregiver enters "000" to complete duty entry	N/A
5	The Caregiver confirms the service performed (Discipline; for example, HHA, PCA, etc.)	The service performed was [Discipline as per Service Code]. Press 1 to confirm, press 0 to deny.
6	The Caregiver indicates if the Patient can participate in verification	Press 1 and hand phone to the Patient for Voice Verification. Press 0 if the Patient is not able to perform Voice Verification.
7	The Patient confirms the service performed (for example, HHA, PCA, etc.)	The service performed was [discipline of service code]. Press 1 to confirm, press 0 to deny"
8	The Patient verifies the Visit Duration	The Visit started at [Call In Time], ended at [Call Out Time], and lasted [duration of visit]. Press 1 to confirm, press 0 to deny, or press * to repeat.
9	The Patient provides a Voice Signature	Please say your full name and today's date. Press 1 to proceed, press 0 to hear recording, or press * to record again.
10	The Clock Out ends	Your call has been registered successfully.

Documenting an Alternate EVV Workflow Verification

On the Visit Info tab, the **Documentation Attestation** field captures an additional layer of confirmation for an Agency to review timesheet information supporting a visit that is manually confirmed or edited directly in the system. The following must be enabled for this field to become available:

1. The **Enable Alternate EVV Workflow** and the **Require Timesheet if EVV linked to Visit w/o verification** checkboxes must be selected in the *Mobile* section of the *Edit Office* page (**Admin > Office Search**).

2. The **Timesheet Approved** checkbox must be selected in the *Visit Info* tab.

The **Documentation Attestation** feature applies to both *Skilled* and *Non-Skilled* visits. When the **Timesheet Approved** checkbox is selected, the system automatically selects the **Document Attestation** checkbox displaying the attestor details (*System User* with *Time/Date*), as seen in the image below.

This functionality is applicable throughout the system, any page that the **Timesheet Approved** checkbox can be selected (such as in the Timesheet Confirmation page).
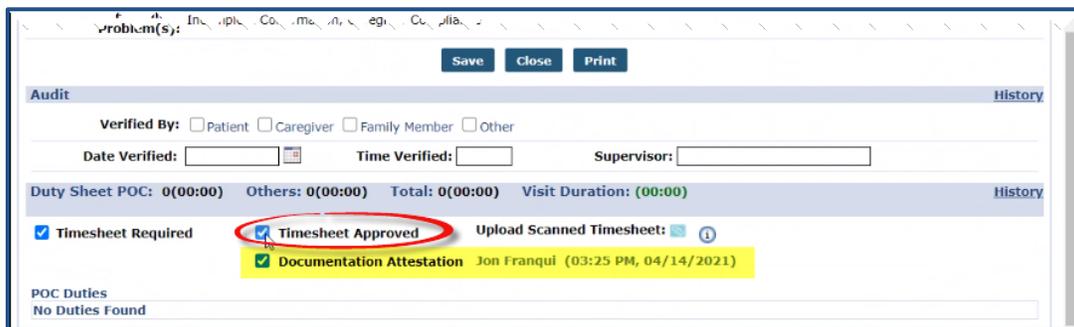
Visit Info Tab: Timesheet Approved – Document Attestation Timestamp

To view *Documentation Attestation* history for the visit, click on the <u>History</u> link to the far-right of the section. On the View History window, select *Documentation Attestation* from the **Field Name** field, as seen in the following image.
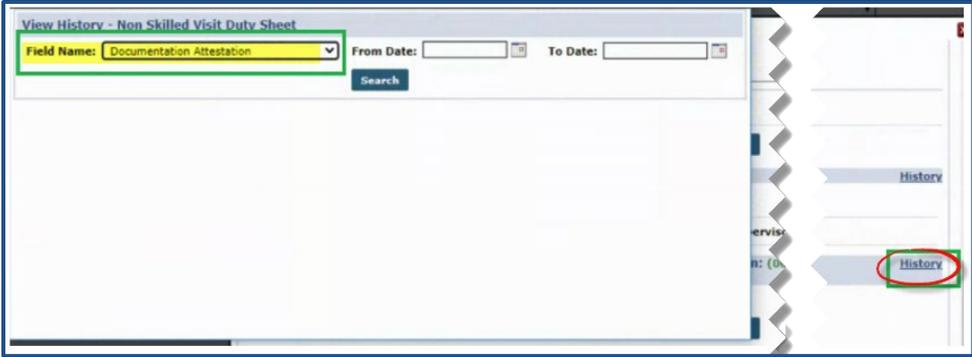
Documentation Attestation: History

Verification Tab in Visit Info Page

DISCLAIMER
This feature is enabled by HHAX System Administration. Contact the <u>HHAX Support Team</u> for assistance.

To be certified as an EVV alternate vendor, one of the core requirements is for the HHAX system to identify, track, and resolve different exceptions. To further enhance the EVV verification process, a *Verification* tab has been added to the *Visit Details* page for Providers to capture reasons, notes, and attestation and resolve verification issues individually. Information associated with each exception and resolution is then sent at the correct times, via integration, to the EVV aggregator.

Verification Tab Added to the Visit Window

The *Verification* tab in the Visit window (as seen in the following image) is used to record specific visit verification details (under the *Service Verifications* and *Service Exceptions* sections).

The *Service Verifications* section captures visit confirmation details applicable to the visit, such as:

- Patient Visit Time Confirmation
- Service Discipline Type
- Service Discipline Confirmation
- Patient Signature
- Patient Voice Verification

Visit Verification Tab

Any exception to the verification details is captured under the *Service Exceptions* section below the *Service Verifications*, covered in the [Resolve Visit Verification Exceptions](#) section below.
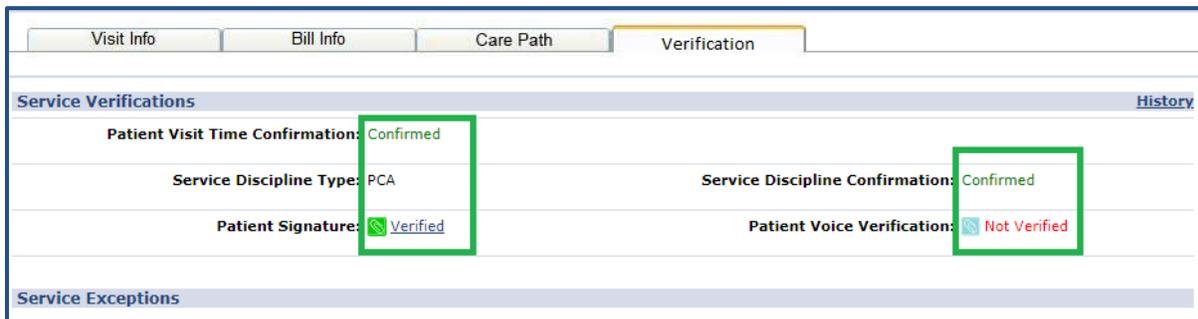
Verification Information Captured by IVR

When a visit is created, the status in all fields display as ***Not Verified*** under the *Service Verifications* section. Once IVR is performed, the fields are populated with applicable information, as illustrated in the following image. For IVR, the Patient provides Voice Verification, audio file attached (as denoted by the green paperclip attachment icon).
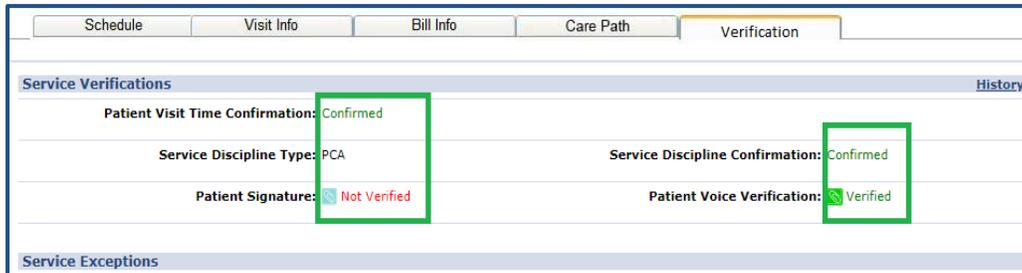
**IVR: Verification Information**

Verification Information Captured by EVV

As with IVR, the same applies for EVV Verifications. When a visit is created, the status in all fields display as ***Not Verified*** under the *Service Verifications* section. Once EVV is performed, the fields are populated with applicable information, as illustrated in the following image. For EVV, the **Patient Signature** is captured (rather than Voice Verification) as denoted by the green paperclip (attachment icon).

EVV Verification Information

To view the Patient signature, hover over the **Patient Signature Verified** link. The Patient Signature pop-up window displays the captured signature.
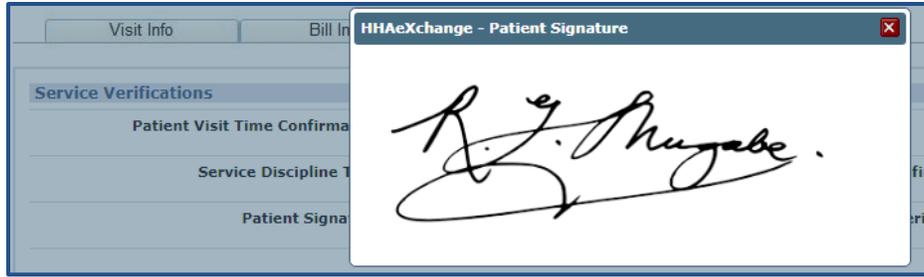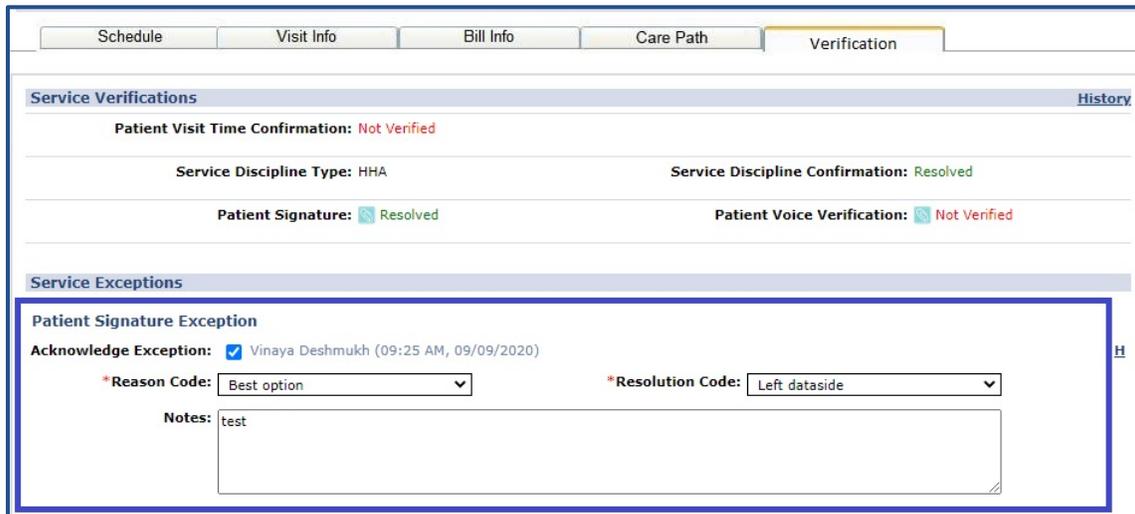
Captured Patient Signature

Resolve Visit Verification Exceptions

The *Verification* tab also includes a ***Service Exceptions*** section to independently confirm that all required services were provided to the Patient. Service Exceptions appear when further confirmation is required for the verification.

To acknowledge an exception, select the **Acknowledge Exception** checkbox. This captures the user who acknowledged the exception as well as the date and time. Select the **Reason Code** and the **Resolution Code** from the dropdown fields; values are derived from the associated Reference Table. Refer to the Alternate EVV Reference Tables section for further guidance.
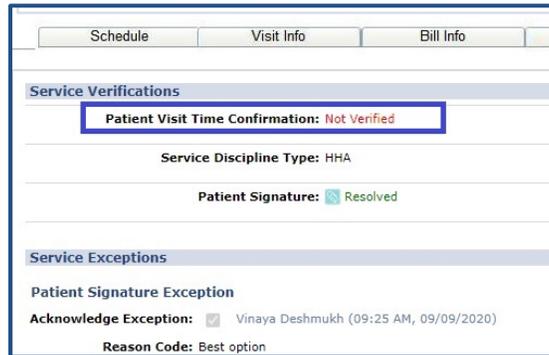

Verification Tab: Service Exceptions Section

The *Service Exceptions* section includes the particular exception (the image above illustrates **Patient Signature Exception**) with the following fields and information to complete (per exception), as needed:

Field	Description
Acknowledge Exception	Select checkbox to record the user, date, and time.
*Reason Code	(Required) Select the Reason Code (values from the Reference Table).
*Resolution Code	(Required) Select the Resolution code (values from the Reference Table).
Notes	(Optional) Enter notes if/as needed.

Complete details for all exceptions as there may be more than one. Once complete, click the *Save* button to finalize. When all required resolution information for an exception is entered, the status changes from **Not Verified** (in red font) to **Resolved** (in green font), as seen in the following images.
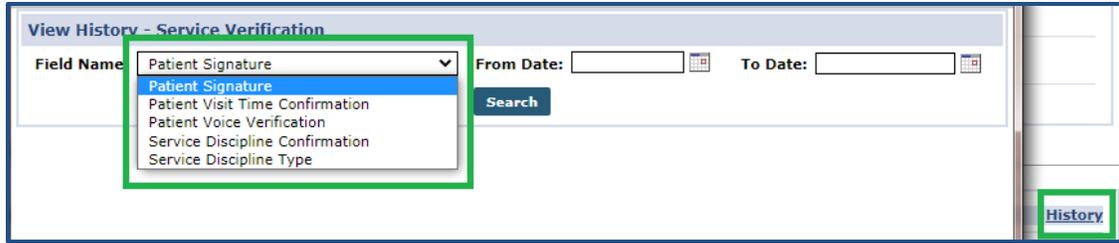

Not Verified

Resolved

Visit Verification and Exception History

To view the verification history log for a visit, click on the **History** link in the *Service Verifications* section. Select a **Field Name** to see specific information.

Service Verification History

To view the history on specific Verification Exceptions fields, click on the respective **H** link. Based on the selection select the category from the **Field Name** field, as seen in the following image.
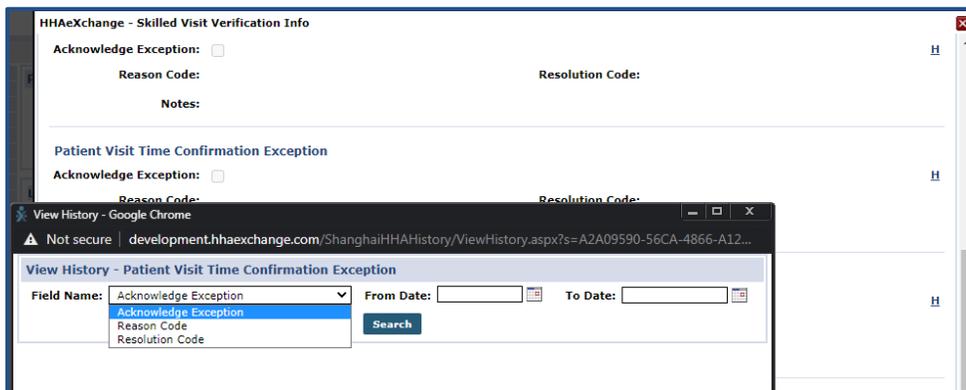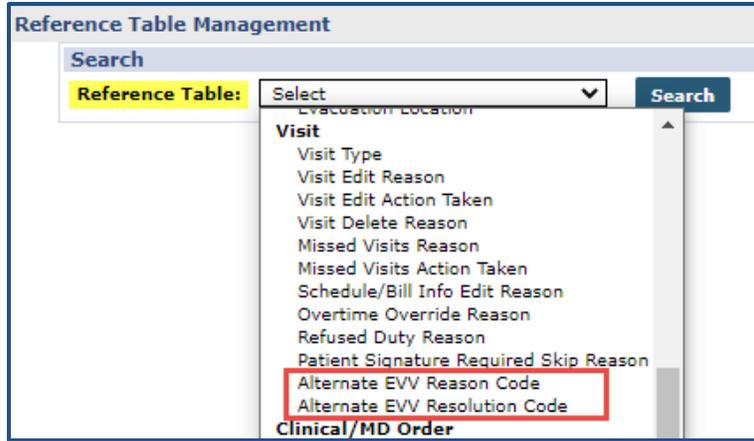

Visit Verification Exception History

Alternate EVV Reference Tables

Values for the **Reason Code** and **Resolution Code** fields in the *Verification* tab are managed by the Agency via the newly added Reference Tables under the Visit category:

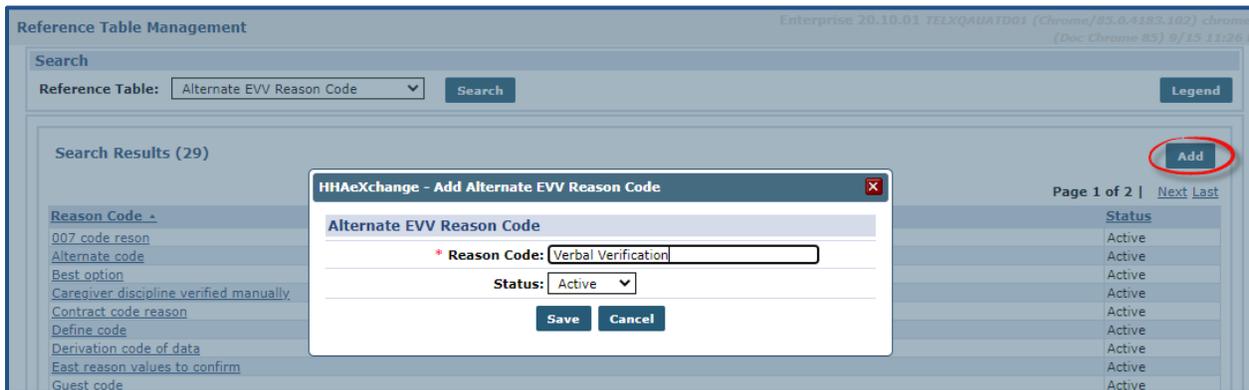- *Alternate EVV Reason Code* and
- *Alternate EVV Resolution Code*

Alternate EVV Reference Tables

Adding Values to the Alternate EVV Reference Tables

To add a value in either Reference Table, navigate to ***Admin > Reference Table Management*** and select the applicable Reference Table. Click the ***Add*** button (at the far right) to open the *Add/Edit* window. The example below illustrates adding an **Alternate EVV Reason Code**. The same applies for the ***Alternate EVV Resolution Code*** Table.

Enter a **Reason Code** (Title), required, as denoted by the red asterisk. Ensure the **Status** is *Active*. Click ***Save*** to add.

Adding an Alternate EVV Reason Code

To edit a **Reason Code**, click on the existing **Reason Code** (link) and make edits in the window. The same applies to the **Resolution Code** values in the ***Alternate EVV Resolution Code Table***.

*Note: Values cannot be deleted. To deactivate a value, select the existing <u>Reason Code</u> (link) from the Reference Table and select <u>Inactive</u> from the **Status** dropdown field.*

Verification Tab Permissions

To assign permissions to a role, navigate to ***Admin > User Management > Edit Roles***. Select *Visit* under the **Section** field and select applicable roles from the **Roles** dropdown.

Verification Tab Permissions

Select the **View Verification Tab** checkbox to enable viewing information on the Verification tab. Select the **Edit Verification Tab** checkbox to enable editing on the Verification tab.

Click **Save** to finalize.

*Note: The **View Verification Tab** permission must be selected to enable the **Edit Verification Tab** permission.*