



# NCDHHS

## Electronic Visit Verification (EVV) Supplemental Training Material

November, 2020  
v 1.1



---

Proprietary and Confidential. Copyright© 2020 Sandata Technologies, LLC. All rights reserved

**Table of Contents**

Covered Services.....	2
Visit Service Selection .....	3
Supported Languages .....	4
Security Settings .....	5
For Sandata EVV:.....	5
For Sandata Mobile Connect (SMC):.....	5
Visit Exceptions .....	6
Reason Codes.....	8
Tasks Performed.....	9

## Covered Services

The covered services table referenced below lists all of the covered services included in the North Carolina EVV Program.

Service Description	Service Code	Modifier
PCS Under Twenty-One	99509	HA
PCS Adults	99509	HB
CAPDA Attendant Care Service 15m	S5125	
CAPDA Attendant Care Cong 15m	S5125	UN
CAPDA In-Home Respite 15m	S5150	
CAPC In-Home Aide	S5125	
CAPC In-Home Respite 15m	S5150	
PNA Asst 15m	T1019	
PNA In-Home Respite 15m	T1004	
CAPC In-Home Respite Cong 15m	S9122	TF
PNA Respite Cong 15m	S9122	TG
CAPC Personal Care Assist 15m	T2027	
CAPC Personal Care Asst Cong	T2027	TF
CAPCD Personal Care Assist 15m	S5135	
CAPCD Personal Care Assist Cong 15m	S5135	UN
CAPCD Attendant Care Cong 15m	S5125	UN
CAPCD Attendant Care 15m	S5125	
CAPCD In-Home Respite 15m	S5150	

## Visit Service Selection

The table below lists the codes an employee enters during a telephone (TVV) call to identify the service and the selection list displayed for selection in the SMC app for a mobile visit check-in.

ID Code to Enter on TVV Call	TVV Prompt for Read back	Selection Display for Mobile
100	PCS Under twenty-one	PCS Under Twenty-One
105	PCS Adults	PCS Adults
110	CAPDA Attendant Care Service 15 Minutes	CAPDA Attendant Care Service 15m
115	CAPDA Attendant Care Cong 15 Minutes	CAPDA Attendant care Cong 15m
120	CAPDA In-Home Respite 15 Minutes	CAPDA In-Home Respite 15m
125	CAPC In-Home Aide	CAPC In-Home Aide
130	CAPC In-Home Respite Fifteen Minutes	CAPC In-Home Respite 15m
135	PNA Asst 15m	PNA Asst 15m
140	PNA In-Home Respite 15 Minutes	PNA In-Home Respite 15m
145	CAPC In-Home Respite Cong 15 Minutes	CAPC In-Home Respite Cong 15m
150	PNA Respite Cong 15 Minutes	PNA Respite Cong 15m
155	CAPC Personal Care Assist 15 Minutes	CAPC Personal Care Assist 15m
160	CAPC Personal Care Asst Cong	CAPC Personal Care Asst Cong
165	CAPCD Personal Care Assist 15 Minutes	CAPCD Personal Care Assist 15m
170	CAPCD Personal Care Assist Cong 15 Minutes	CAPCD Personal Care Assist Cong 15m
175	CAPCD Attend care Cong 15 Minutes	CAPCD Attendant Care Cong 15m
180	CAPCD Attendant care service 15 Minutes	CAPCD Attendant Care 15m
185	CAPCD In-Home Respite 15 Minutes	CAPCD In-Home Respite 15m

## Supported Languages

For Sandata Mobile Connect (SMC) and Telephone

Supported Languages	Presentation Order
English	1
Spanish	2

## Security Settings

This section contains the program requirements specified for logins and passwords.

### For Sandata EVV:

- Username: the email address entered during user account creation.
- Password:
  - Minimum length of 12 characters
  - Must contain at least one upper case letter
  - Must contain at least one lower case letter
  - Must contain at least one number
  - Must contain at least one special character
- Password is valid for 60 days.
- The last 12 passwords are stored in the system and cannot be re-used.

### For Sandata Mobile Connect (SMC):

- Username: the email address entered during account creation.
- Password:
  - Minimum length of 12 characters
  - Must contain at least one upper case letter
  - Must contain at least one lower case letter
  - Must contain at least one number
  - Must contain at least one special character
- Password is valid for 90 days.
  - Password expiration warning message begins appearing: 10 days before expiration.
- Application timeout warning message appears after: 5 minutes.
  - Timeout warning will display for 5 minutes. If the app remains idle after 2 minutes, the user is logged out.
- Application Lock Out: 3 unsuccessful sequential login attempts within 15 minutes.
- Security Questions: 3 security questions must be set up and answered when resetting a forgotten password.
- Past Visits View: Employee can see 7 days of past visits in SMC.

## Visit Exceptions

Visit exceptions occur when the EVV system identifies that a program defined issue exists for a visit. When this occurs, an agency user with the appropriate Visit Maintenance security privileges is able to document missing or incorrect data for the visit or acknowledge that the exception occurred and resolve it.

More than one exception can apply to a single visit and fixing one issue within Visit Maintenance may also fix other exceptions. A visit with one or more exceptions has an 'incomplete' status, which may impact billing (depending on program configuration). Clearing or resolving all exceptions on an incomplete visit, updates the visit status to 'verified'. A visit with the status of verified, means there are no exceptions. All changes and updates are tracked within the History tab of the visit.

For each exception, the following have been defined:

- The level of exception. Exceptions can be:
  - "Fix" – must be fixed for the visit to be considered complete.
  - "Acknowledge" – visit must be acknowledged by a system user to be considered complete.

Exception	Description	Setting	Parameter
Invalid Service	This exception occurs when the service selected for a visit is not valid for the program / recipient of care.	Fix	n/a
Missing Service	This exception occurs when the service provided during a visit is not recorded or present in the system.	Fix	n/a
Unknown Client	This exception occurs for a visit that was performed for a client that is not yet entered or not found in the EVV system	Fix	n/a
Unknown Employee	This exception occurs for a visit that was performed by a caregiver who was not yet entered or not found in the EVV system (At the time the visit was recorded).	Fix	n/a



Exception	Description	Setting	Parameter
Visits Without In-Calls	This exception occurs when a visit is recorded without an "in" call that began the visit.	Fix	n/a
Visits Without Out Calls	This exception occurs when a visit is recorded without an "out" call that completed the visit.	Fix	n/a
No Show	This exception occurs when a visit has been scheduled, but no calls have been received for that visit.	Fix	n/a
Unscheduled Visit	This exception occurs when a visit is started or completed without a schedule in place for that member + service + caregiver.	Fix	n/a

## Reason Codes

Reason codes are used when making all Visit Maintenance changes or updates, including fixing exceptions and when making manual changes to visits. There is also the ability to add a note to provide additional clarification when reason codes are selected. For certain reason codes, the note may be required.

The table below lists the reason codes for the program and if the code requires a note to be entered.

Note that reason code descriptions may be abbreviated for presentation on the Sandata EVV and Sandata Aggregator system.

Code Description	Reason Note Required? (Y/N)
Caregiver Error	Yes
Beneficiary Suspended	Yes
Mobile Device Issue	Yes
Telephony Issue	Yes
Beneficiary in Hospital	Yes
Unsafe Environment	Yes
Beneficiary Refused Service	Yes
Beneficiary No Show	Yes
Caregiver No Show	Yes
FVV Device not Available	Yes
Legally Responsible Party Refused Service	Yes
Other	Yes

## Tasks Performed

Tasks are the actual activities performed during the visit. The Sandata EVV system provides a standard task list across the program that the employee selects from to indicate tasks provided. The list of tasks cannot be limited by employee discipline or service.

- For the Sandata Mobile Connect application, the employee selects as many tasks as appropriate based on the Task Description column in the below table. For each selected task, the employee will specify if it was completed or refused by the client.
- For Sandata Telephony and Sandata Fixed Visit Verification, the employee will select the tasks performed by entering the task ID. The system will validate their keypad entry and, if valid, read back the text in the 'Task Description' column.

Task ID	Task Description*
0010	Tub bath or shower
0020	Upper body
0030	Lower body
0040	Tub/shower transfer/position
0050	Bed bath
0060	Sponge bath
0070	Additional transfer (reposition in bed, change occupied bed)
0080	Shampoo/hair care
0090	Skin care (includes wash face/hands, foot care)
0100	Nail care
0110	Mouth/oral/denture care
0120	Shave
0130	Don clothing/shoes/socks
0140	Remove clothing/shoes/socks
0150	Clothing and shoe fasteners
0160	Assist with TEDS
0170	Assist with braces/splints
0180	Assist with binders
0190	Assist with prosthetics
0200	Transfer to/from bed
0210	Ambulation room to room
0220	Assist with stairs
0230	Passive/active ROM
0240	Turn/reposition
0250	Remove/pull up/fasten garments
0260	Hygiene after toileting

Task ID	Task Description*
0270	Transfer to/from BSC or toilet
0280	Assist with cutting food
0290	Assist with feeding
0300	Assist with utensil usage
0310	Lift limb to mouth
0320	Tube feeding
0330	Clean meal service area
0340	Clean utensils/dishes, empty trash
0350	Open packages
0360	Equipment set up and clean up
0370	Heat/assemble food
0380	Transfer to/from chair
0390	To/from bed
0400	To/from chair
0410	To/from toilet
0420	To/from scooter
0430	To/from stroller
0440	To/from wheelchair
0450	to/from vehicle
0460	Shampoo/hair care
0470	Skin care (includes wash face/hands, foot care)
0480	Make up
0490	Nail care/trimming
0500	Mouth/oral/denture care
0510	Shaving
0520	Errands to assist with ADLs (CAP only)
0530	BP monitoring
0540	Blood glucose monitoring
0550	Medication self-administration reminders
0560	Break up and remove fecal impaction
0570	IV fluid assistive activities
0580	O2 therapy
0590	Ostomy care/irrigation
0600	Sterile dressing change (wound over 48 hours old)
0610	Suctioning, nasopharyngeal
0620	Suctioning, oropharyngeal
0630	Tracheostomy care
0640	Urinary catheterization/irrigation

Task ID	Task Description*
0650	Wound irrigation
0660	Tube feeding and G-tube management