



Rhode Island EOHHS Electronic Visit Verification (EVV) Program Provider Training – Phase I

EVV Telephony Call Process



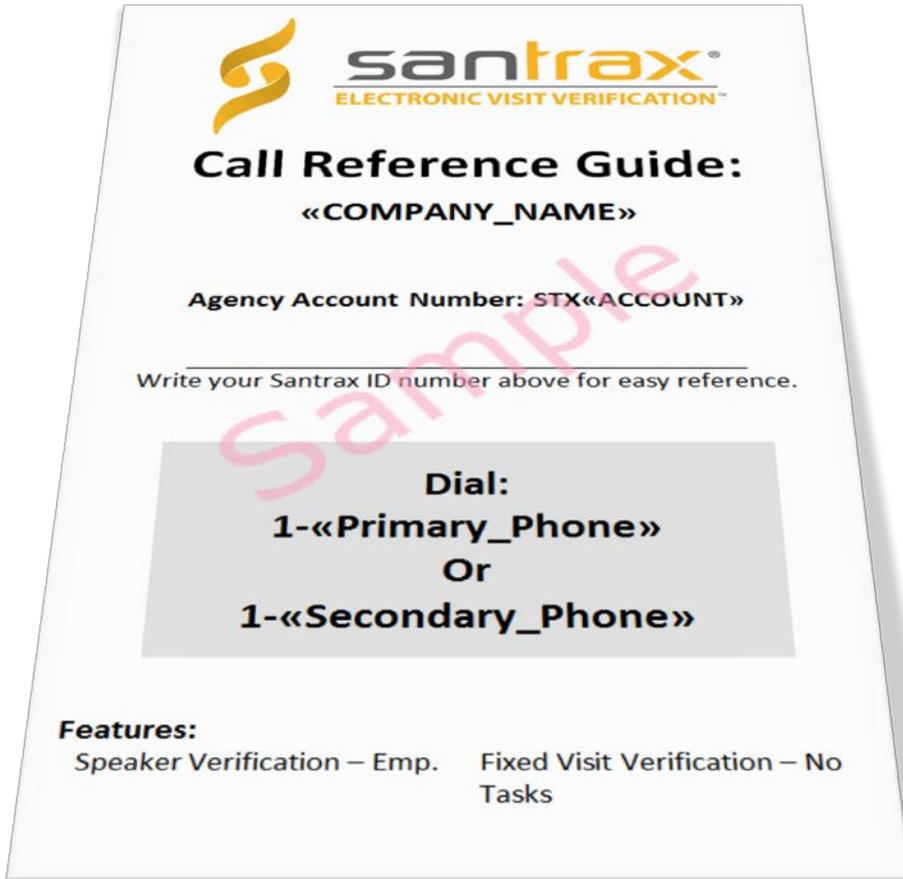
Agenda

- ⚡ Electronic Visit Verification (EVV)
Call Process
- ⚡ Mobile Visit Verification (MVV)
Process
- ⚡ Fixed Visit Verification (FVV)
Devices

Visit Verification Options

- ⚡ Caregivers call-in and call-out for each individual visit.
 - From the client's home landline telephone.
 - Verify identity by entering a unique Santrax ID and speaking their voiceprint.
- ⚡ Caregivers may also start and end each visit using an app downloaded onto their smartphone or tablet.
- ⚡ An alternative to the landline and app visit verification process when recipients don't have phones is an FVV device.
- ⚡ Instruction and Reference materials to be provided.

Call Reference Guide



- Each agency is assigned a unique account number and given an agency specific Call Reference Guide (CRG).
- Sandata provides your agency with two toll-free English numbers and two Spanish numbers to ensure continuous service.
- Call Reference Guide and related account materials will be sent via email as part of the Welcome Kit upon completion of training.

Call Reference Guide

Calling Instructions

STX«ACCOUNT»

Calling In: When arriving at the client's home, make sure you have the following information:

- Your Santrax ID.

Remember: When speaking to Santrax on any toll-free line, speak in English, slowly and clearly one digit at a time (1075 = one, zero, seven, five).

-  **Dial any of the toll-free numbers assigned to your agency.**
 Santrax will say: **"Welcome, please enter your Santrax ID."**
If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.
-  **Press the numbers of your Santrax ID on the touch tone phone.**
You also have the option to speak your Santrax ID in English, slowly and clearly one digit at a time.
 Santrax will say: **"To verify your identity, please repeat: At Santrax, my voice is my password."**
-  **Say "At Santrax, my voice is my password."**
The Santrax system may ask you to repeat the phrase several times before verifying your identity.
 Santrax will say: **"If this is a Fixed Visit Verification visit using the FVV device, press the star (*) key to enter the visit verification numbers. Otherwise, press the pound (#) key to continue."**
If this is an FVV Call, press the star () key and refer to the FVV Call Reference Guide for detailed instruction for the FVV call process. If this is not an FVV call, press pound (#) and continue.*
-  **Press the pound (#) key to continue.**
 Santrax will say: **"Received at (TIME). Enter number of tasks."**
NOTE: *If you are placing the in call, HANG UP NOW. Tasks are only entered on the out call.*

Calling Instructions

STX«ACCOUNT»

Calling Out: When leaving the client's home, make sure you have the following information:

- Your Santrax ID.
- A list of tasks performed.

Remember: When speaking to Santrax on an English toll-free line, speak slowly and clearly one digit at a time (1075 = one, zero, seven, five).

- Follow steps 1 - 4, and then continue.**
 Santrax will say: **"Received at (TIME). Enter number of tasks."**
-  **Press the total number of tasks performed for the client.**
 Santrax will say, **"Enter task ID."**
-  **Press the Task Number you performed.**
NOTES:
 - Refer to your agency's task list.
 - If you performed more than one task, wait for the system to confirm the task and then enter the next task number until you have entered all tasks performed during the visit.
 - If you are performing a task with a reading, Santrax will pause after receiving the Task ID. During the pause, press the appropriate reading for this task using the amount of digits indicated on the task list.
 - If you made a mistake entering Tasks, press "00", the system will confirm by saying: **"Starting Over, Enter number of tasks"**. Enter all task ID's again.
-  Santrax will say: **"You entered (NUMBER) task(s)."**
-  **Hang up.**

Call Process – In Call

1. Upon arriving at the recipient's home, the caregiver calls the Santrax toll-free phone number
2. The caregiver enters their Santrax ID using the phone's keypad
3. The caregiver speaks their recorded voiceprint phrase: *"At Santrax, my voice is my password."*
4. Santrax will confirm the call time and prompt to press the * key for a Fixed Verification Visit or press # to continue
5. The caregiver will press # and hang up



Call Process – Out Call

1. Before leaving the recipient's home, the caregiver calls the Santrax toll-free phone number.
2. The caregiver enters their Santrax ID using the phone's keypad.
3. The caregiver speaks their recorded voiceprint phrase: *"At Santrax, my voice is my password."*
4. Santrax will confirm the call time and prompt to press the * key for a Fixed Verification Visit or press # to continue.
5. The caregiver will press # and continue.
6. Santrax will prompt the caregiver to enter the total number of tasks performed.
7. The caregiver will then enter the total number of tasks and each Task ID.
8. Santrax will repeat the Task description.
9. Each Task ID will be entered until complete.



Task List



Task ID	Description
10	Medications-infusion
11	Injection
12	Catheter care
13	Empty colostomy bag
14	Skin Care/Protocol
15	Monitor skin Condition
16	Apply hot application
17	Therapeutic Support
18	Tracheostomy care
19	Wound care
20	Assist tube feeding
21	Assist with Ambulation/Mobility/Transfer
22	Assist clean/dressing change
23	Passive and Active Range Of Motion Exercises
24	Apply cold application
25	Urine Test
26	Diet Monitoring



Task List



Task ID	Description
27	Oral Care
28	Bathing
31	Grooming
32	Toileting
34	Turning & Positioning
35	Feeding
36	Housekeeping
37	Meal Preparation
38	Nail Care
39	Specimen Collection
40	Mental Health
79	Make Bed
81	Grocery Shop Errands
82	Laundry Ironing
83	Accompany to MD Clinic
84	Accompany to other Location
85	Skin Care or Protocol with necrotic tissue
86	Skin Care or Protocol infected and draining
99	FVVD Installation
125	Patient Refused

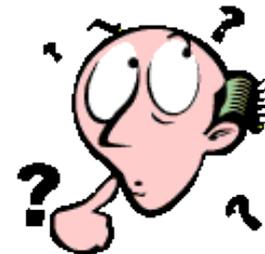


Call Process - Helpful Hints



Pulse or Rotary Phone? (Not touch-tone phone)

*Speak the Santrax ID and tasks
(English toll-free numbers only).*



Busy Signal?

Use the other toll free number.

No answer? ID not recognized?

Make sure you dialed the right number.

Call again.

*If there are still problems, the caregiver should
call their agency.*

Consecutive Services



Example: 08:00 – 11:00 Personal Care
11:00 – 13:00 Homemaker

- ⚡ Caregiver calls at 08:00 to begin the shift.
- ⚡ Caregiver calls at 11:00. This ends the first service and begins the second.
- ⚡ Caregiver calls at 13:00 to end the shift.
- ⚡ The EVV system requires one call at the changeover of services. This serves as both the IN and OUT call.

What is MVV?



- Sandata Mobile Visit Verification (MVV) is an application installed on a smart phone or tablet device, allowing a caregiver to start and end a recipient visit without requiring the use of the recipient's home telephone.



MVV Login Screen

1. Enter the **Registration ID**. (*begins with the number 3, followed by a dash, then your assigned unique agency ID. E.g. 3-1234*)
2. Enter the **Username**. (*unique - assigned to the caregiver by the Provider agency. The caregiver would be added as a User in the Agency Management system*)
3. Enter the **Password**. (*unique - assigned by the Provider agency. The password would be added in the Staff Security screen in the Agency Management system*)
4. Tap on **LOG IN**.

Verizon 5:10 AM 100%

Sandata MVV
Mobile Visit Verification & Point of Care

REGISTRATION ID
1

USERNAME
2

PASSWORD
3

4 **LOG IN**

To reset the User Name or Password please contact the Agency.
Sandata MVV v4.1.0

MVV Home Screen

The screenshot shows a mobile application interface for 'Visits'. At the top, the status bar shows 'Verizon', '5:06 AM', and '100%' battery. The app header is green with a hamburger menu, the title 'Visits', and a 'LOG OUT' button. The main content area features a 'MY NEXT VISIT' card for Charles Young on Apr 26, 2016, with a 'START VISIT' button. Below this is a list of visits for 'Today' and 'Tomorrow'. Callout boxes point to various elements: 'Next Visit Details' points to the top card; 'Directions to Recipient's Home' points to the address; 'List of current day's visits with Client & Times' points to the 'Today' section; 'List of future scheduled visits' points to the 'Tomorrow' section; 'Help Guide' points to the question mark icon at the bottom; 'Start Current Visit' points to the 'START VISIT' button; and 'Client search to begin unscheduled Visits' points to the 'PATIENTS' tab.

Next Visit Details

Directions to Recipient's Home

List of current day's visits with Client & Times

List of future scheduled visits

Help Guide

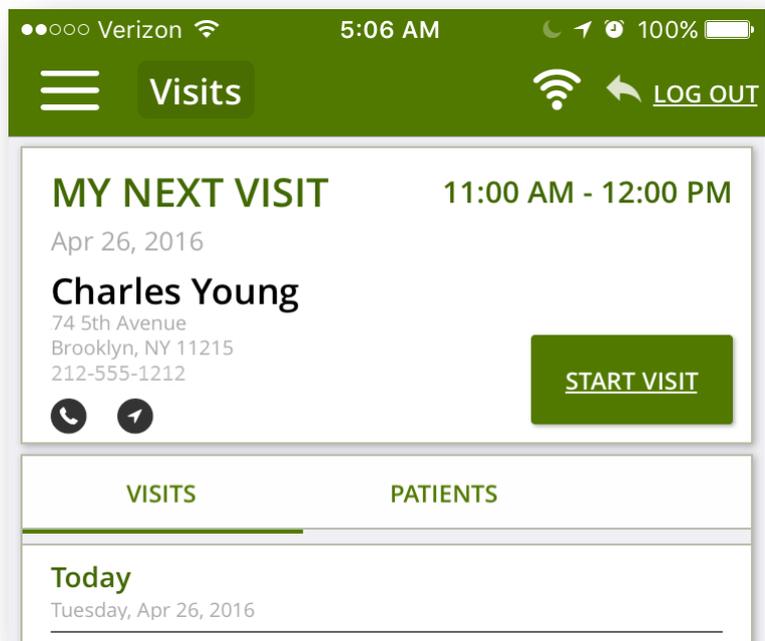
Start Current Visit

Client search to begin unscheduled Visits

MVV – Starting a Visit

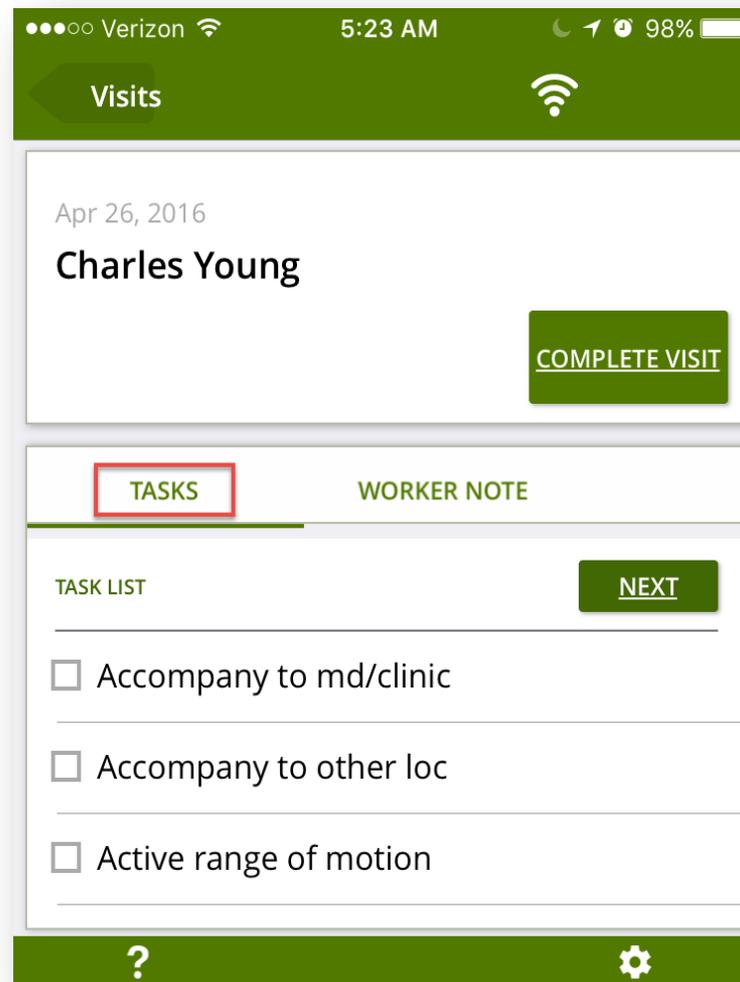


- Upon arriving at the recipient's home, the caregiver logs into MVV and taps the **Start Visit** button for their visit.



MVV – Ending a Visit – Task Selection

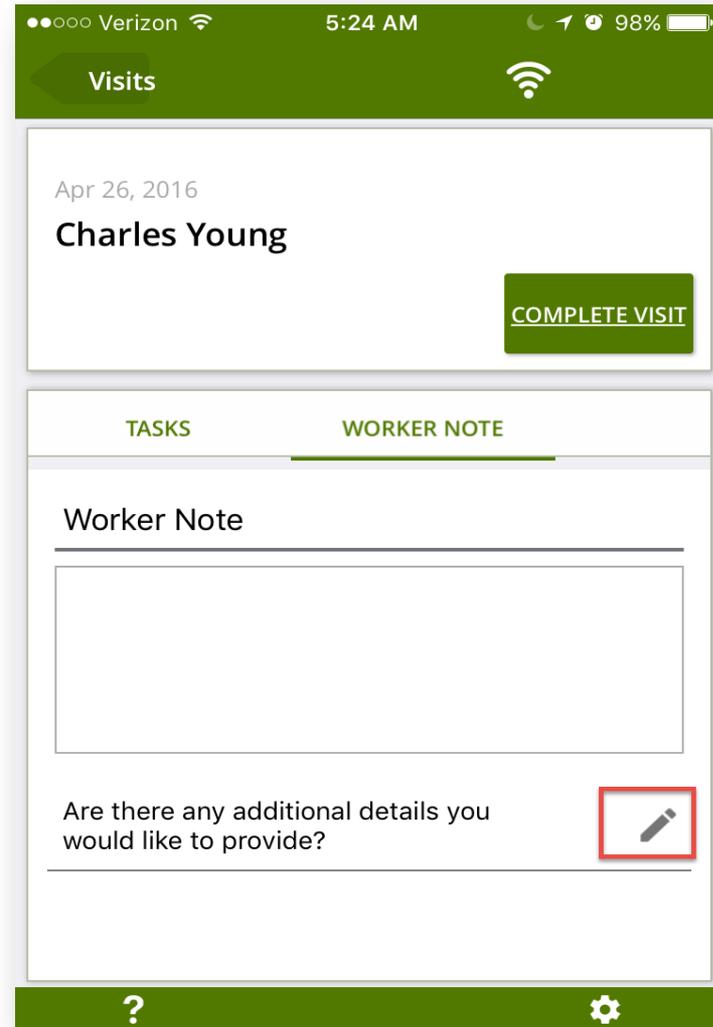
- ⚡ At the end of the visit, the caregiver selects the tasks performed for the recipient.
- ⚡ The caregiver will also indicate if the task was Completed or Refused by the patient.
- ⚡ Tap the **Select Task** button to add additional tasks performed.



MVV – Ending a Visit – Worker Notes



- Tap on the **Worker Note** section then tap on the **Pencil** [] icon to provide any free text comment notes related to the visit.



- Fixed Visit Verification is a way of capturing a caregiver's start and end times for a visit when the recipient does not have a home landline phone or does not allow the caregiver to use their phone.



- ⚡ The FVV Device provides a 6 digit value when pressed.
- ⚡ The value represents the date and time when it was pressed.
- ⚡ The caregiver presses the FVV upon arrival and before leaving the recipient's home.
- ⚡ The two values represent the call-in and call-out times.
- ⚡ The caregiver may call Santrax 15 minutes after the visit, from any phone to enter the two 6 digit values or wait until the end of the day to call in the values.
- ⚡ The caregiver must have the client ID when making FVV calls.
- ⚡ The values will appear as start and end times for the visit.



Start of Visit

- Press and release either button on FVV
- Write down the six digit value. This represents the call in time

End of Visit

- Press and release either button on FVV
- Write down the six digit value. This represents the call out time.

**** Note: If they need to see the number again, they may press and release any button again to display the reading.***

FVV - Call Process Introduction



- ⚡ Wait 15 minutes after obtaining the second FVV value before making the Santrax call.
- ⚡ Before calling, the caregiver should have the following information:
 - His or her Santrax ID.
 - The Client ID.
 - First six-digit visit verification number, date and time of arrival (obtained at the beginning of the visit).
 - Second six-digit visit verification number, date and time of departure (obtained at the end of the visit).

FVV – Call Process



Call Reference Guide:

«COMPANY_NAME»

Agency Account Number: STX«ACCOUNT»

Write your Santrax ID number above for easy reference.

Dial:
1-«Primary_Phone»
Or
1-«Secondary_Phone»

Features:

Speaker Verification – Emp. FVV Yes
Tasks

1. Call the toll free number
2. Enter your Santrax ID
3. Speak the voiceprint phrase
4. Press the star (*) key
5. Enter the Client ID of the customer receiving services
6. Enter the 1st FVV value
7. Press the pound (#) key to continue
8. Enter the 2nd FVV value
9. Press the pound (#) key to continue
10. Enter tasks performed



FVV – Call Reference Guide

Calling Instructions	STX«ACCOUNT»	Calling Instructions	STX«ACCOUNT»
<p>Upon Arrival: When you arrive at the client's home, press and release either of the buttons on the FVV Device and write down the First six-digit visit verification number displayed on the device's screen, as you will use this number later to make your Santrax call. Note the date and time you pushed the button.</p> <p>Before Departing: At the end of the visit, press and release either of the buttons on the FVV Device and write down the Second six-digit visit verification number displayed on the device's screen, as you will use this number later to make your Santrax call. Note the date and time you pushed the button.</p> <p>NOTE: If you need to see the number again right away, you may press and release the button one more time to display the reading. If you get a different number, that's ok, use the new number.</p> <p><i>Do not hold the button down, always press <u>and</u> release.</i></p> <p>Before calling into Santrax, make sure you have the following information:</p> <ul style="list-style-type: none"> ✓ Your Santrax ID ✓ The Client's ID ✓ First Six-digit visit verification number representing the date and time of arrival (obtained at the beginning of the visit). ✓ Second Six-digit visit verification number representing the date and time of departure (obtained at the end of the visit). <p><i>Once you have this information, you are ready to call into Santrax!</i></p>		<p> Santrax will say: "To verify your identity, please repeat: At Santrax, my voice is my password."</p> <p>3.  Say "At Santrax, my voice is my password." <i>The Santrax system may ask you to repeat the phrase several times before verifying your identity.</i></p> <p> Santrax will say: "Received at (TIME). If this is a Fixed Visit Verification visit using the FVV device, press the star (*) key to enter the visit verification numbers. Otherwise, press the pound (#) key to continue."</p> <p>4.  Press the star (*) key.  Santrax will say: "Please enter first Client ID."</p> <p>5.  Enter the Client ID. If the Client ID is entered incorrectly, the Santrax system will say: "No FVV registered, please re-enter the client ID or press the pound (#) key to continue."</p> <p> Once the Client ID is entered correctly, Santrax will say: "Please enter your first visit verification number or press the pound (#) key to continue."</p> <p>6.  Enter the first visit verification number. <i>This is the first six-digit number you obtained from the FVV Device when you arrived at the client's home and will represent your time in.</i></p> <p> When the visit verification number is entered correctly Santrax will confirm it by saying: "The first visit verification number is (DATE/TIME). If this is incorrect, press 1 to retry or press the pound (#) key to continue."</p> <p>NOTE: Listen to check that the date and time provided are the same as the date and time the button on the device was pushed. If they don't match, an incorrect visit verification number may have been entered. Press one (1) to re-enter the number.</p>	
<p>NOTES:</p> <ul style="list-style-type: none"> • Do not call into Santrax until <u>at least 15 minutes after</u> you receive the second six-digit number at the end of your visit. • You must call into Santrax within <u>seven days</u> of the start of the visit. • You do not need to wait at the client's location to make the call. • Both of the six-digit visit verification numbers will be entered on a <u>single Santrax call</u>. <p>1.  Dial any of the toll-free numbers assigned to your agency.  Santrax will say: "Welcome, please enter your Santrax ID." <i>If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.</i></p> <p>2.  Press the numbers of your Santrax ID on the touch tone phone.  You also have the option to speak your Santrax ID in English, slowly and clearly one digit at a time.</p>			

FVV - Troubleshooting: Invalid Client ID



- ⚡ If the caregiver incorrectly enters a Client ID, Santrax will say:
“No FVV registered, please re-enter the Client ID or press the pound key to continue.”
 - Re-enter the correct Client ID.
 - Continue with the FVV call.

- ⚡ If the caregiver still has trouble with the Client ID they should:
 - Hang up and try the call again.
 - Contact your agency for the correct Client ID, then try the call again.

FVV - Troubleshooting: Incorrect FVV Value



- ⚡ If the caregiver incorrectly enters the FVV value:
 - Santrax says **“Invalid visit verification number, please try again.”**
- ⚡ The caregiver should:
 - Press 1 to re-enter the correct FVV number and then will be prompted to continue the FVV call.
 - Call your agency office if they continue to receive an error message.

FVV - Troubleshooting: No FVV Numbers Entered



- 📞 Santrax says: **“You have not entered any visit verification numbers, press one to return or press the pound key to continue”**
 - If the (*) key was accidentally pressed and the call is not a FVV call, the caregiver should hang up.
 - If the FVV value is known, the caregiver should re-enter the correct number.
 - If FVV numbers are unknown, the caregiver should hang up and call the office to report the problem so the visit can be manually corrected.

Requesting an FVV Device



- ④ The Home Health Service Provider initiates a request for an FVV device only when:
 - The recipient does not have a telephone, –OR–
 - The recipient lives in an area that does not have service available.

- ④ Sandata will deliver registered FVV devices to the Provider agency for installation.

What You Have Learned

- ⚡ Understanding the types of Electronic Visit Verification:
 - Landline telephone
 - Mobile Visit Verification (MVV)
 - Fixed Visit Verification (FVV)
- ⚡ Instruction for the call process for consecutive services
- ⚡ Using Mobile Visit Verification (MVV)
- ⚡ Using and requesting Fixed Visit Verification (FVV) devices

