



MODULE 2: VISIT VERIFICATION

*BlueCare Tennessee Employment and
Community First EVV Program*

March, 2018

VISIT VERIFICATION OPTIONS

1. Primary Option

Mobile Visit Verification (MVV)

2. Back-up Option

EVV Telephony Call Process



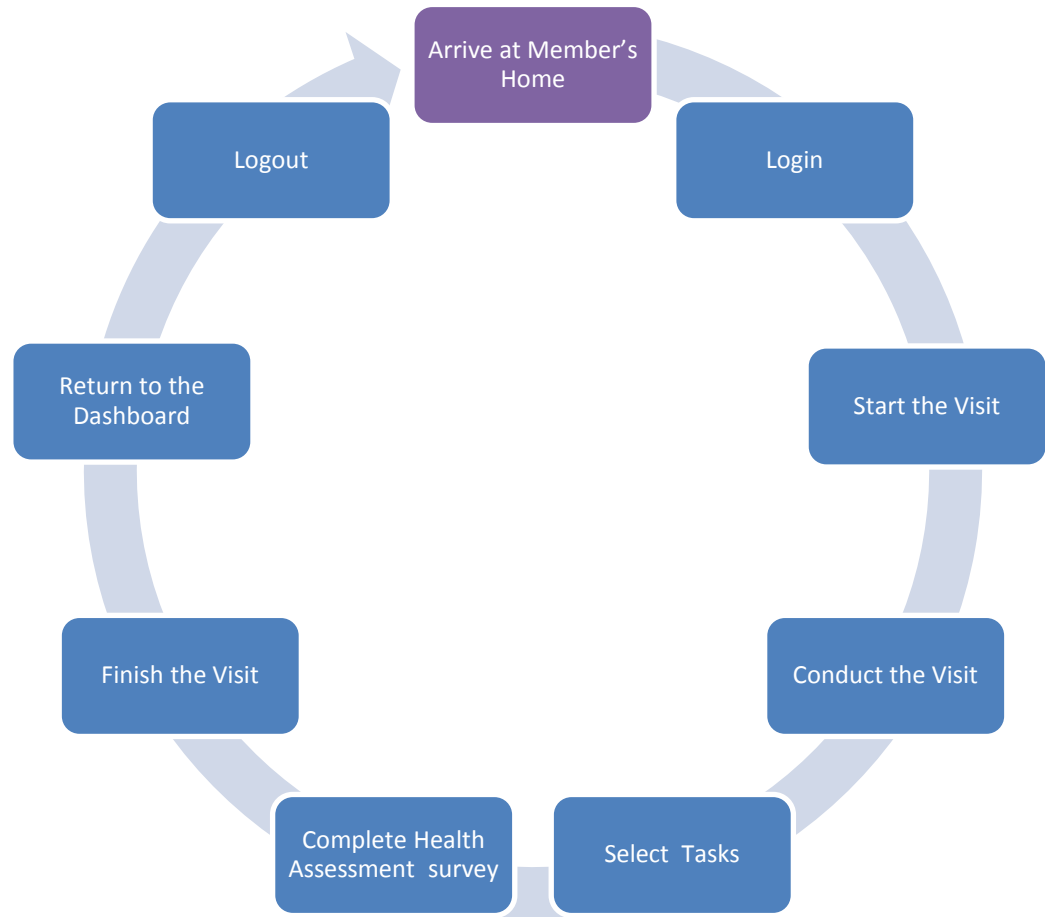
MOBILE VISIT VERIFICATION

Sandata Mobile Visit Verification (MVV)

MVV is an online application which allows a caregiver to start and end a member visit without requiring the use of the member's home telephone.

MVV Workflow

The following steps will be covered in order to give a comprehensive overview of the MVV application



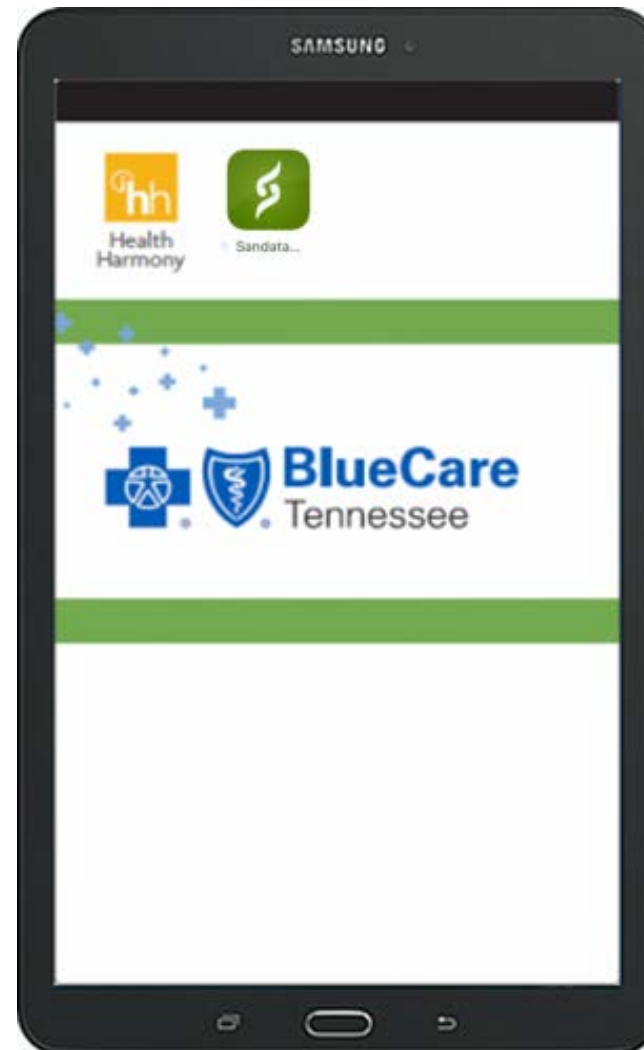
MVV – Arriving at the Client's home

Upon arrival at the member's home the caregiver should locate the member's tablet to log into MVV



MVV – Arriving at the Client's home

The MVV application is loaded on the device and one tap enables access to MVV (Santrax Point of Care) login portal



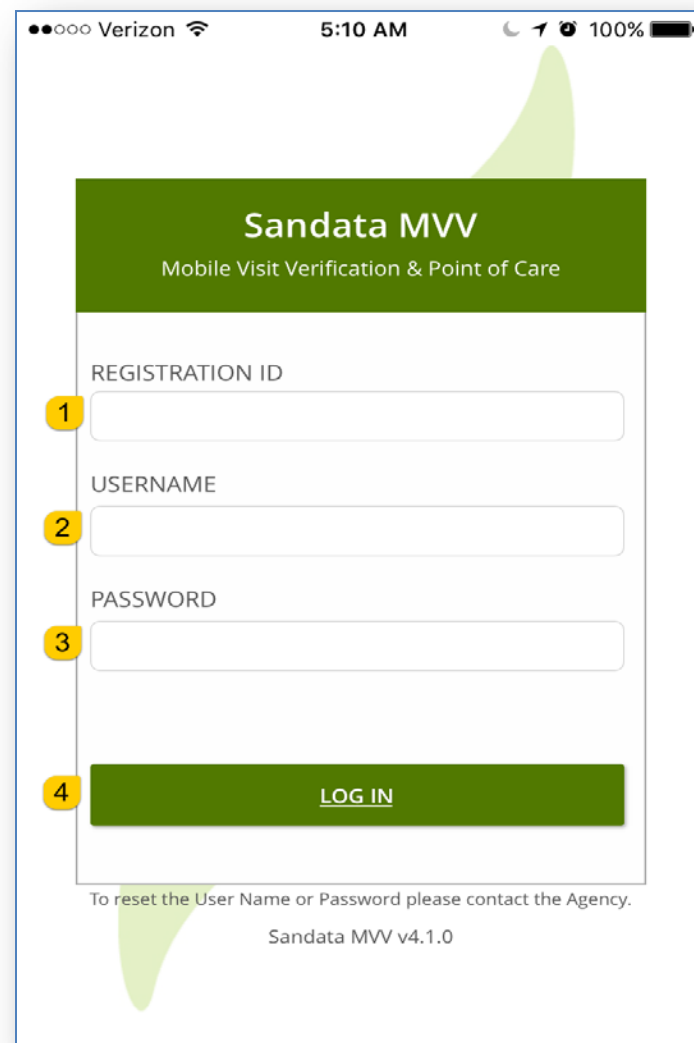


LOGGING IN

Logging in to MVV

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

* **Note:** A GPS signal strength indicator screen may appear after Login, simply tap Continue to move to the home screen.



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

Next Visit Details

Directions to Client's Home

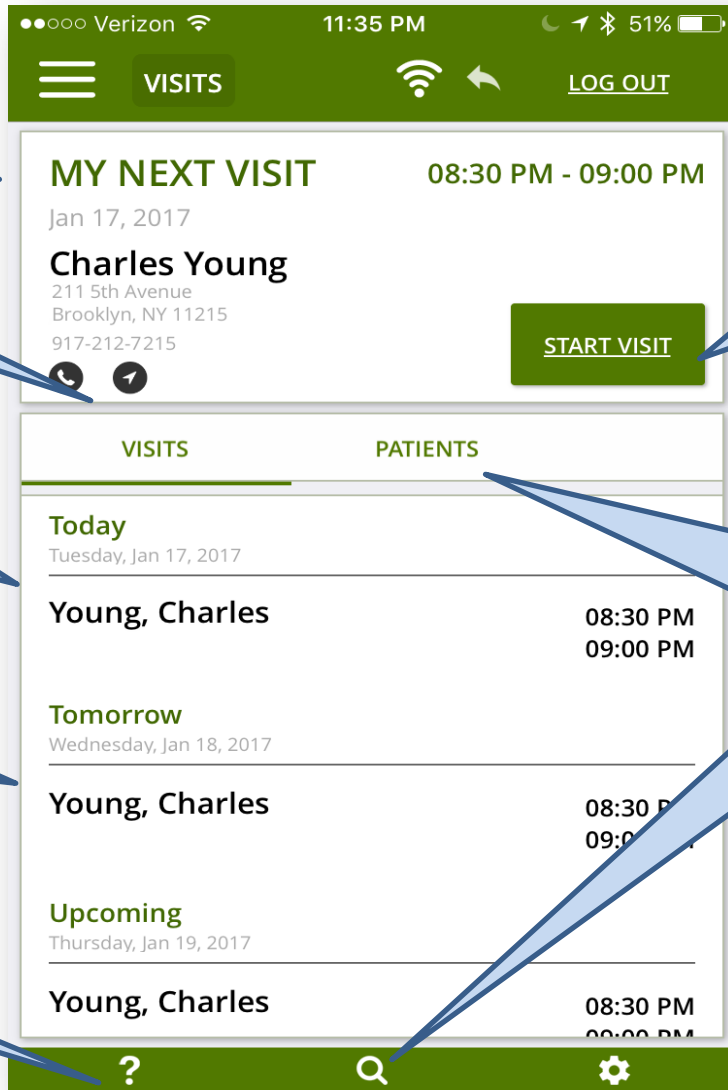
List of current day's visits with Client & Times

List of future scheduled visits

Help Guide

Start Scheduled Next Visit

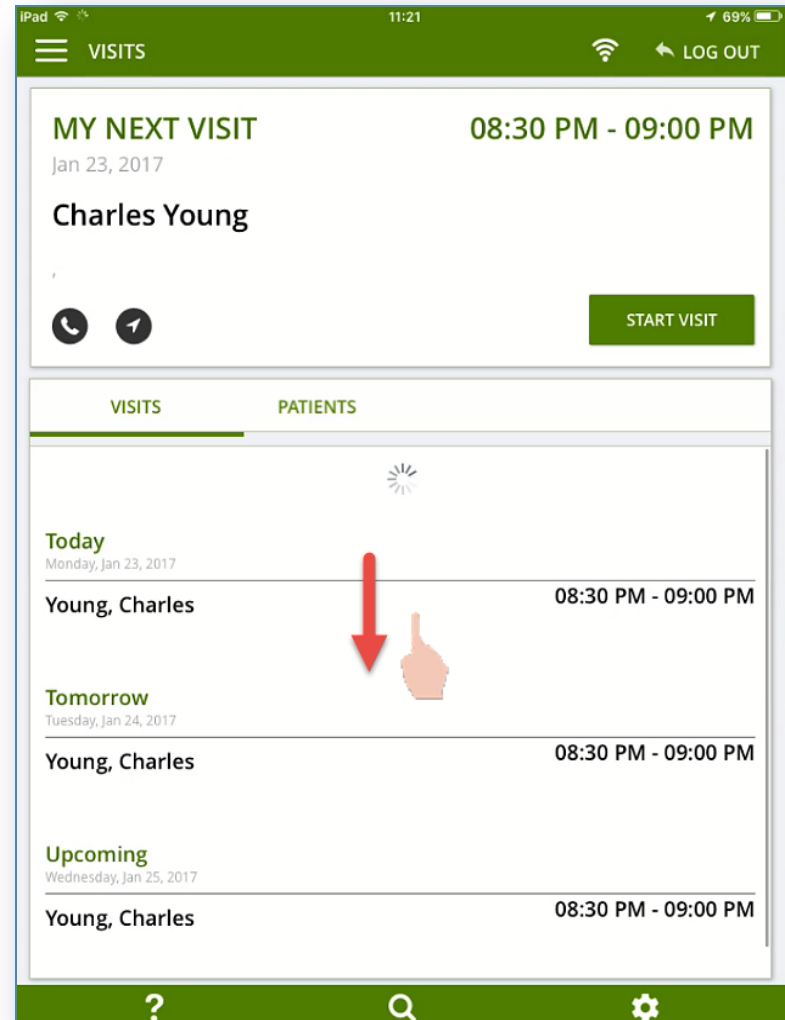
Client search to begin unscheduled Visits



The screenshot shows the MVV Home Screen app interface. At the top, the status bar displays 'Verizon', signal strength, time '11:35 PM', and battery level '51%'. The app header is green with a hamburger menu icon, the word 'VISITS', a Wi-Fi icon, a back arrow, and a 'LOG OUT' link. The main content area features a 'MY NEXT VISIT' section for 'Charles Young' on 'Jan 17, 2017' at '08:30 PM - 09:00 PM'. It includes the address '211 5th Avenue, Brooklyn, NY 11215' and phone number '917-212-7215'. A green 'START VISIT' button is present. Below this is a list of visits categorized by 'Today' (Tuesday, Jan 17, 2017), 'Tomorrow' (Wednesday, Jan 18, 2017), and 'Upcoming' (Thursday, Jan 19, 2017). Each category lists 'Young, Charles' with a time slot of '08:30 PM - 09:00 PM'. At the bottom, there is a green bar with icons for a help guide (question mark), a search function (magnifying glass), and settings (gear).

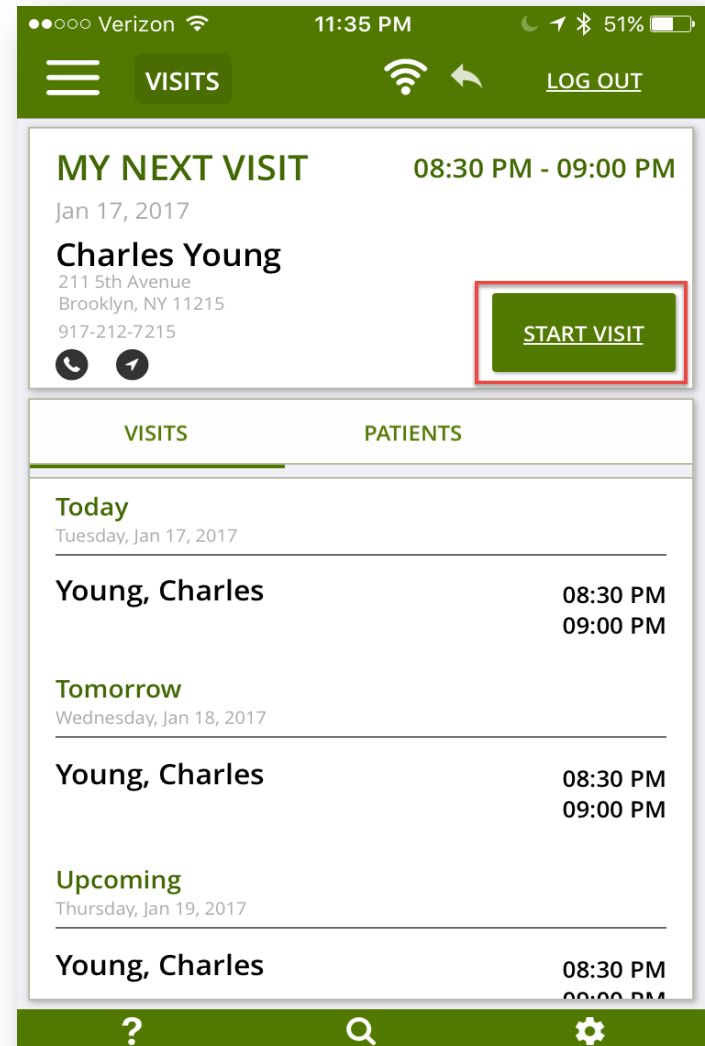
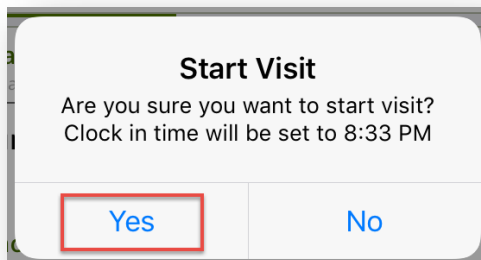
Refreshing Visit Data

- As a best practice, before starting a visit, refresh the visit data to ensure you have the most up to date visit information.
- Refresh by tapping on the visits area of the screen and dragging your finger down the screen to display a spinning circle icon indicating refresh.



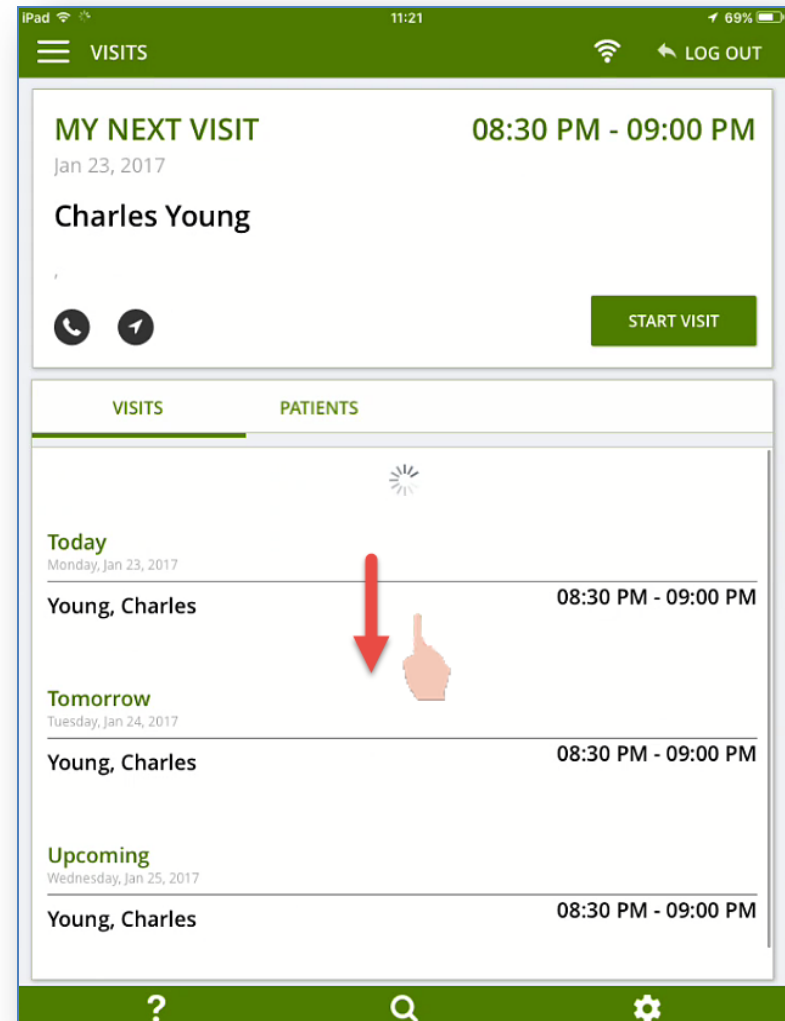
Starting a Scheduled Visit

1. Upon arriving at the client's home, the caregiver logs into MVV and taps the **Start Visit** button to start their visit.
2. Tap **Yes** to confirm the start and time of the visit.



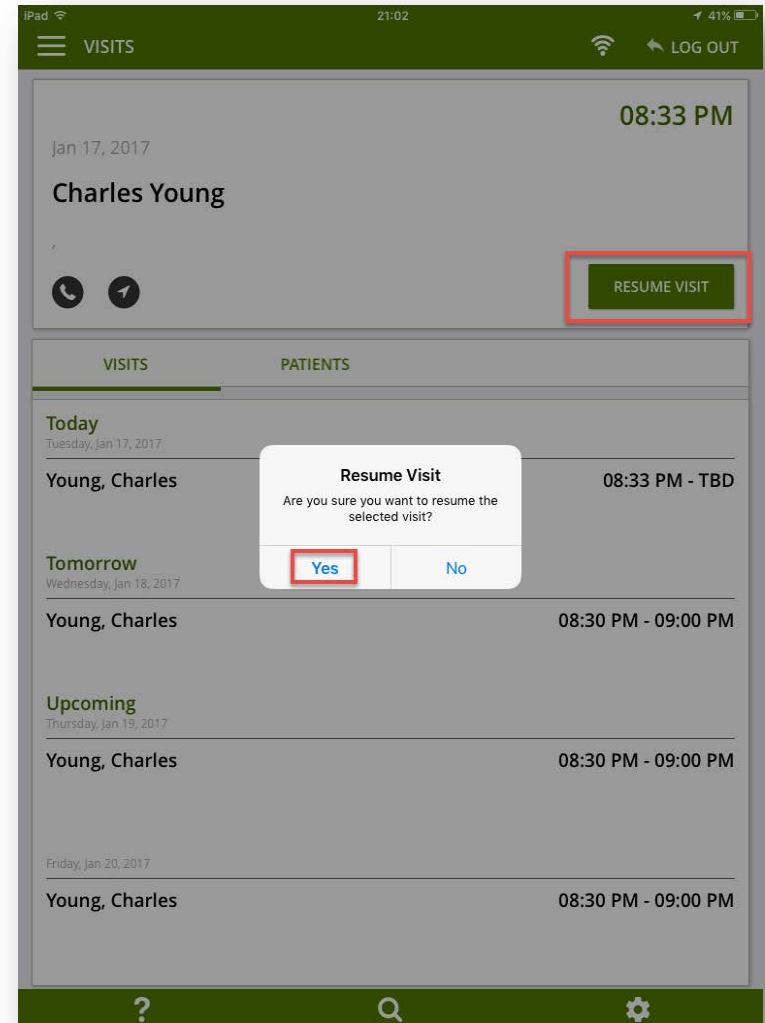
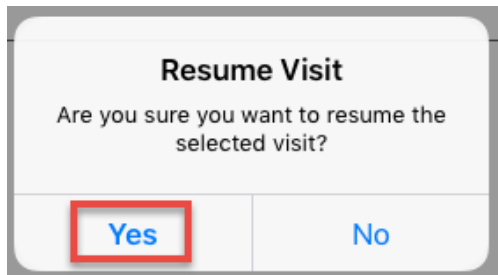
Ending a Scheduled Visit - Refreshing Visit Data

- At the end of the visit, log back in to MVV.
- Refresh the visit data to ensure you have the most up to date visit information.
- Refresh by tapping on the visits area of the screen and dragging your finger down the screen to display a spinning circle icon indicating refresh.



Ending a Scheduled Visit

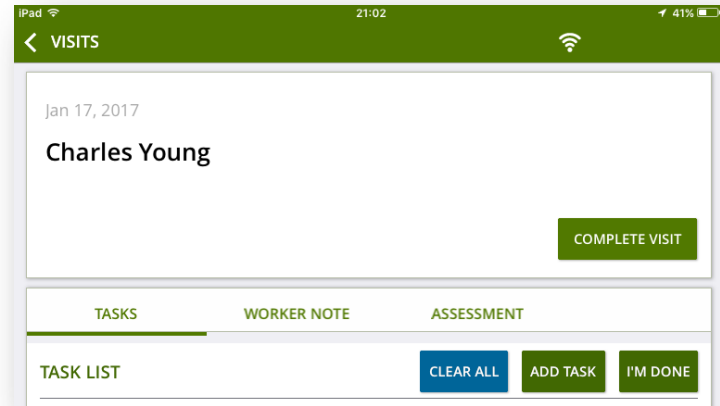
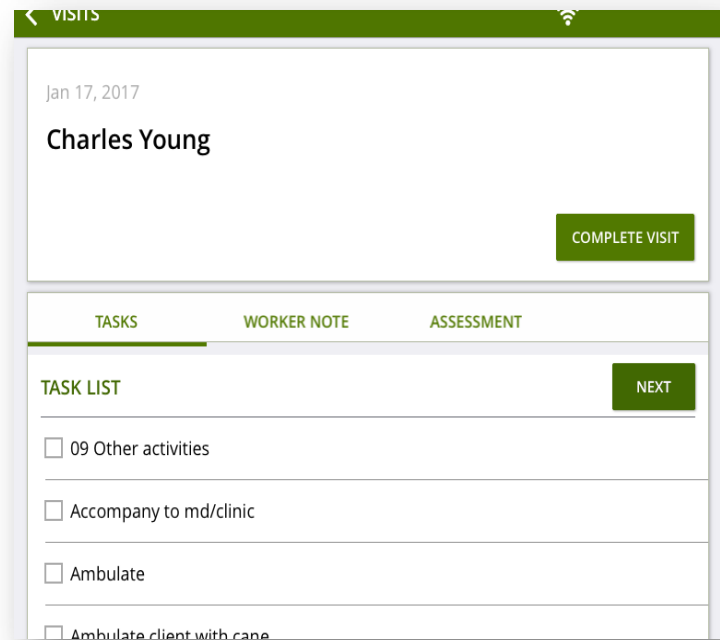
1. Tap the **Resume Visit** button.
2. Tap **Yes** to confirm resumption of the visit.



Ending a Scheduled Visit – Adding Tasks

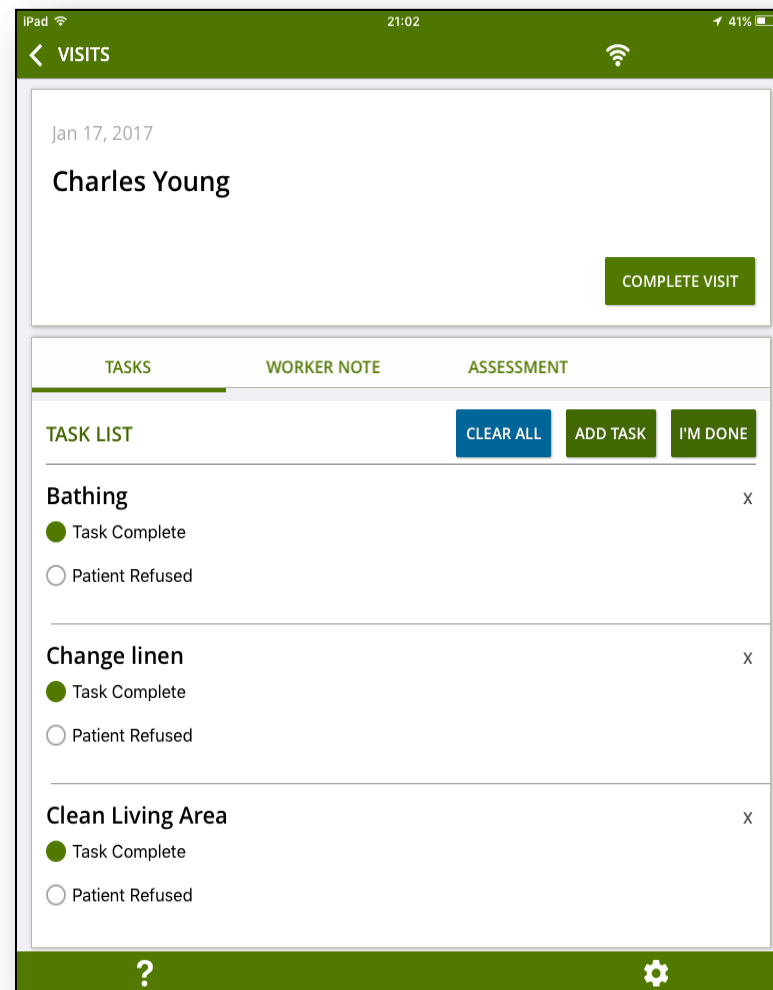
1. Tap the **Add Task** button
2. Tap the box next to a task name to select the task.
3. Tap **Next** once all tasks performed have been selected.

** **Note:** Tasks are not required. Tap the **I'm Done** button to move to the next screen.*

Ending a Scheduled Visit – Adding Tasks

4. Tap **Complete** or **Patient Refused** for each selected task.
 - Tap the **X** to the right of the task to delete task.
 - Tap the **Clear All** button to delete all selected tasks.
 - Tap the **Add Task** button to add additional task(s).
5. Tap the **I'm Done** button to move to the next screen.



iPad 21:02 41%

< VISITS

Jan 17, 2017

Charles Young

COMPLETE VISIT

TASKS WORKER NOTE ASSESSMENT

TASK LIST CLEAR ALL ADD TASK I'M DONE

Bathing X

● Task Complete

○ Patient Refused

Change linen X

● Task Complete

○ Patient Refused

Clean Living Area X

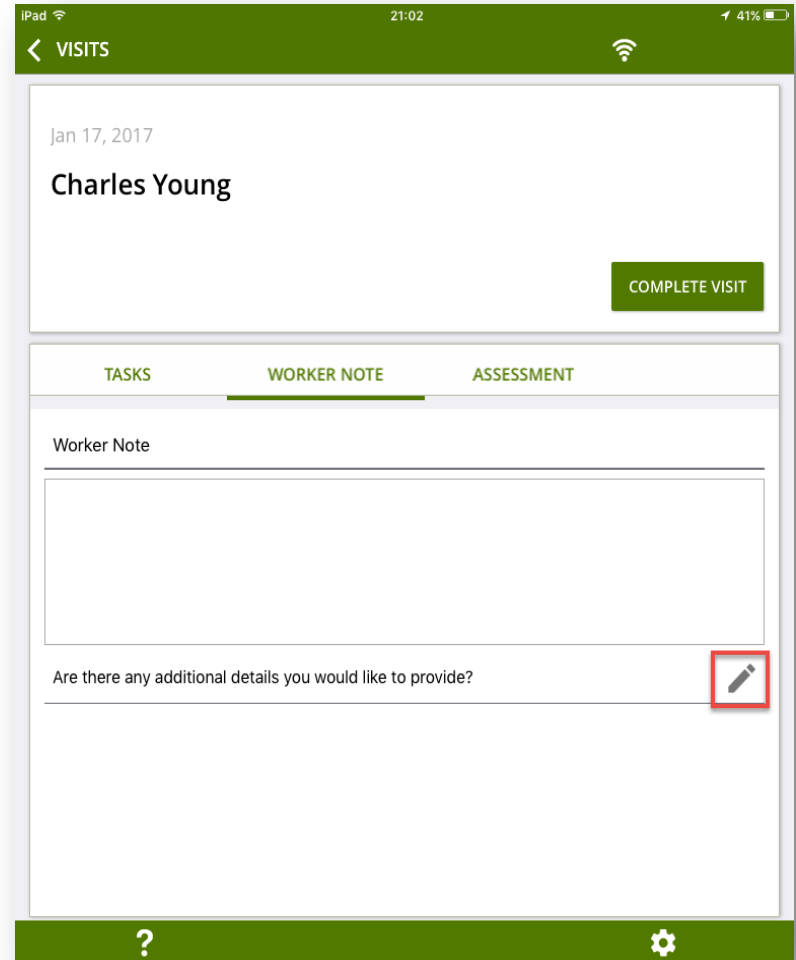
● Task Complete

○ Patient Refused

? ⚙

Ending a Scheduled Visit – Worker Notes

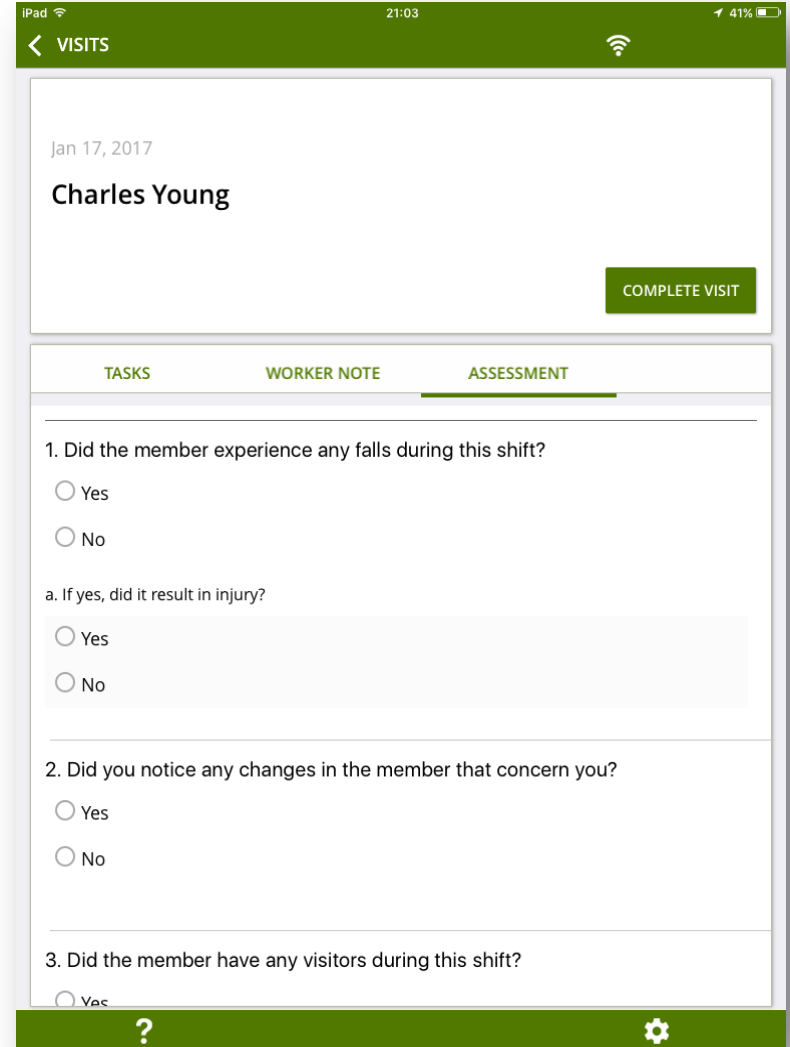
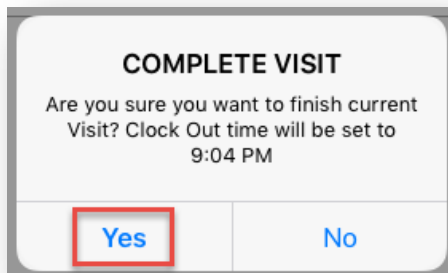
1. Tap the **Pencil** [] icon or in the text box to enter any visits notes.
2. Tap the **Assessment** link to answer the required assessment questions.



The screenshot shows the 'VISITS' screen on an iPad. At the top, the status bar shows 'iPad', signal strength, time '21:02', and battery '41%'. The app header is green with a back arrow and 'VISITS'. Below this, the date 'Jan 17, 2017' and the name 'Charles Young' are displayed. A green button labeled 'COMPLETE VISIT' is in the top right. A tab bar below has three options: 'TASKS', 'WORKER NOTE' (which is selected and underlined), and 'ASSESSMENT'. Under the 'WORKER NOTE' tab, there is a text area labeled 'Worker Note'. Below the text area is a question: 'Are there any additional details you would like to provide?'. To the right of this question is a red square icon containing a pencil, which is highlighted by a red box. At the bottom of the screen is a green bar with a question mark icon on the left and a settings gear icon on the right.

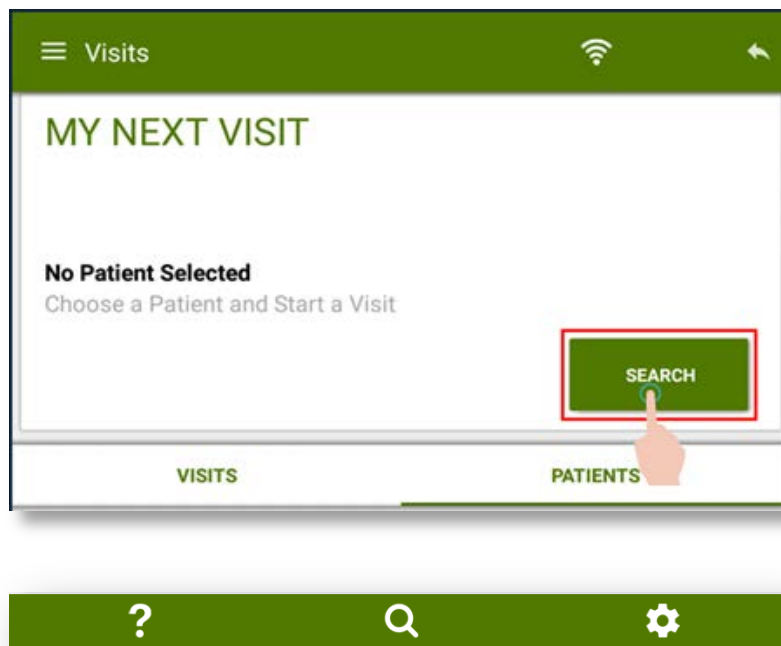
Ending a Scheduled Visit – Assessment

- ◆ Complete the assessment questions by tapping **Yes** or **No** to respond.
- ◆ Tap the **Complete Visit** button then **Yes** to confirm.



Starting an Unscheduled Visit

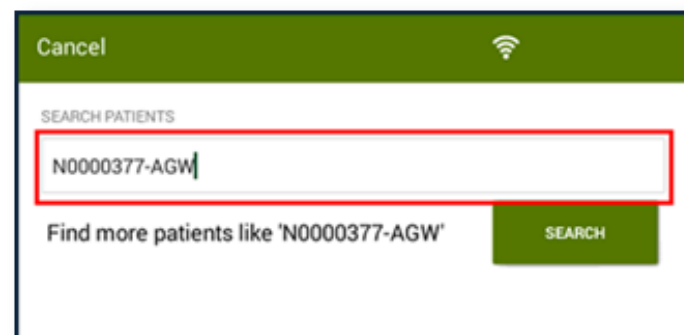
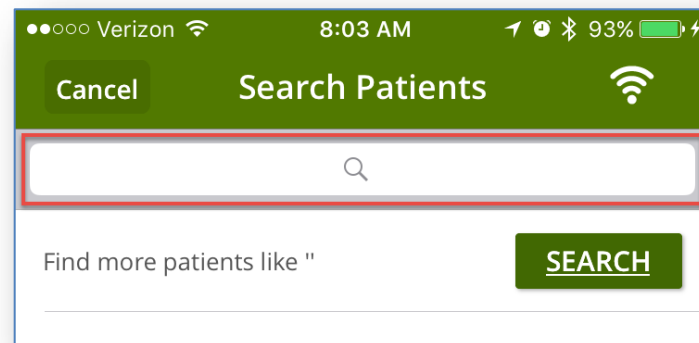
1. Upon arriving at the client's home, the caregiver logs into MVV, taps the Patients link and taps the **Search** button or the magnifying glass at the bottom of the screen.



Starting an Unscheduled Visit

2. Tap in the **Search Patients** field.
3. Enter the client's Chart ID in its entirety and tap **Search**.

** **Note:** Enter the Client Chart ID including any leading zeros. The client Chart ID can be found by running the Client Address report under Client in the Reports module.*



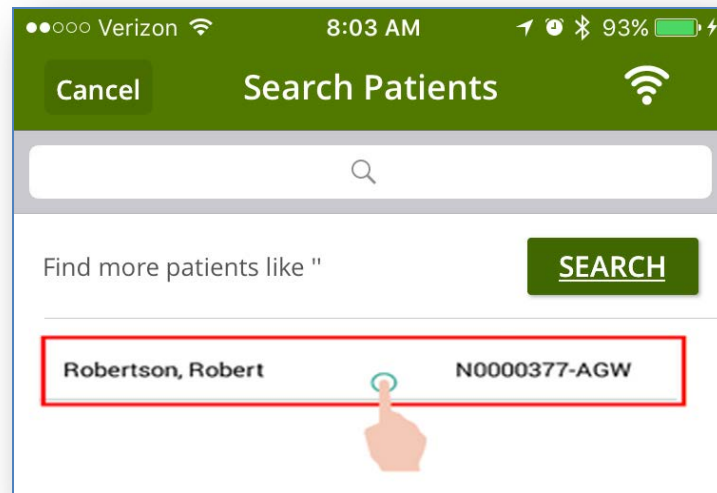
Starting an Unscheduled Visit – Locating Client Chart ID

From the Reports Module, run the Client Addresses report.

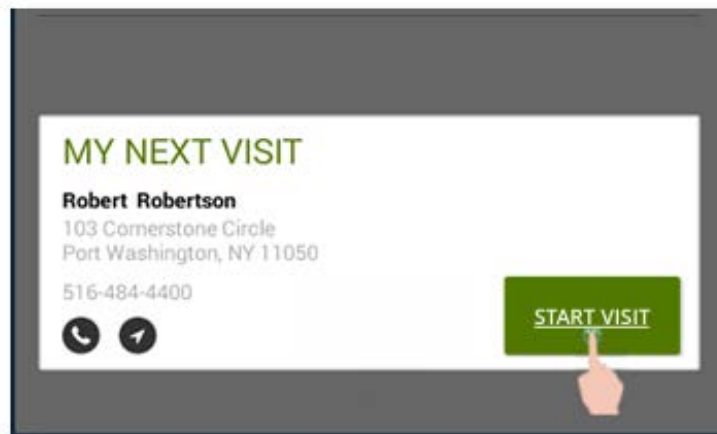
Client Addresses					
Client Status = '02- Active'					
Name	ChartID	Stx ClientID	Phone	SOC	Address
Bennett, Frank	C0000008-CE	0008	(423) 535-3309	10/1/14	2508 Elm Hill Pike, Nashville, TN 37214
Chattanooga, Susan S.	C0000001-CS	0001	(423) 535-7580	4/16/14	30039 mossbank drive, Wesley Chapel,
Clienta, Victor	C0000374-AC	0374	(848) 789-7987	3/5/15	1818 Main Street, Bartow, FL 33830
Clientb, Victoria	C0000376-AC	0376	(984) 096-7409	3/9/15	2110 E Main Street, Bartow, FL 33830
Coiner, Daniel W.	N744444444-AG	0362	(615) 666-6666	1/1/15	1 Century Blvd, Nashville, TN 37130461
Covington, Franklin	N0000005-CW	0005	(615) 565-1918	10/23/14	2267 Blakemore Dr, Clarksville, TN 370
Curtisly, Bradley	C0000009-CE	0009	(615) 565-1940	7/1/14	3200 West End Ave. 102, Nashville, TN
Ian, Mason	C0000012-CM	0012	(516) 484-4400	12/1/10	26 Harbor Park Dr, Port Washington, NY
Smith, James	C0000003-CE	0003		7/1/14	3200 West End Ave 102, Nashville, TN :
Smith, Suzie	N0000004-CS	0004	(615) 937-7438	10/23/14	605 Homey Ct, Antioch, TN 37013
Smothers, Sue	N0000011-CM	0011	(423) 555-1212	11/18/14	1 Cameron Hill, Building 4.4, Chattanooga 37402
Tester, Beta	C0000010-CM	0010	(555) 555-1212	11/13/14	22, Huntington Station, NY 11750
Young, Charles	C0000378-CE	0378		1/17/17	

Starting an Unscheduled Visit

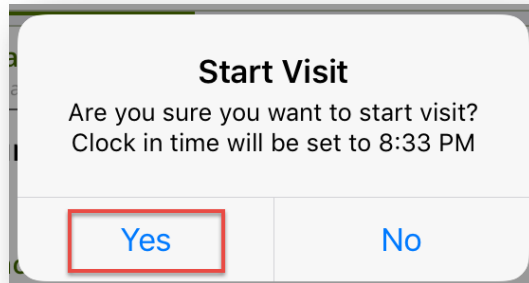
4. From the search results, tap the client's name. The **My Next Visit** pop-up will open.



5. Tap the **Start Visit** button.



6. Tap **Yes** to confirm the start of the visit.



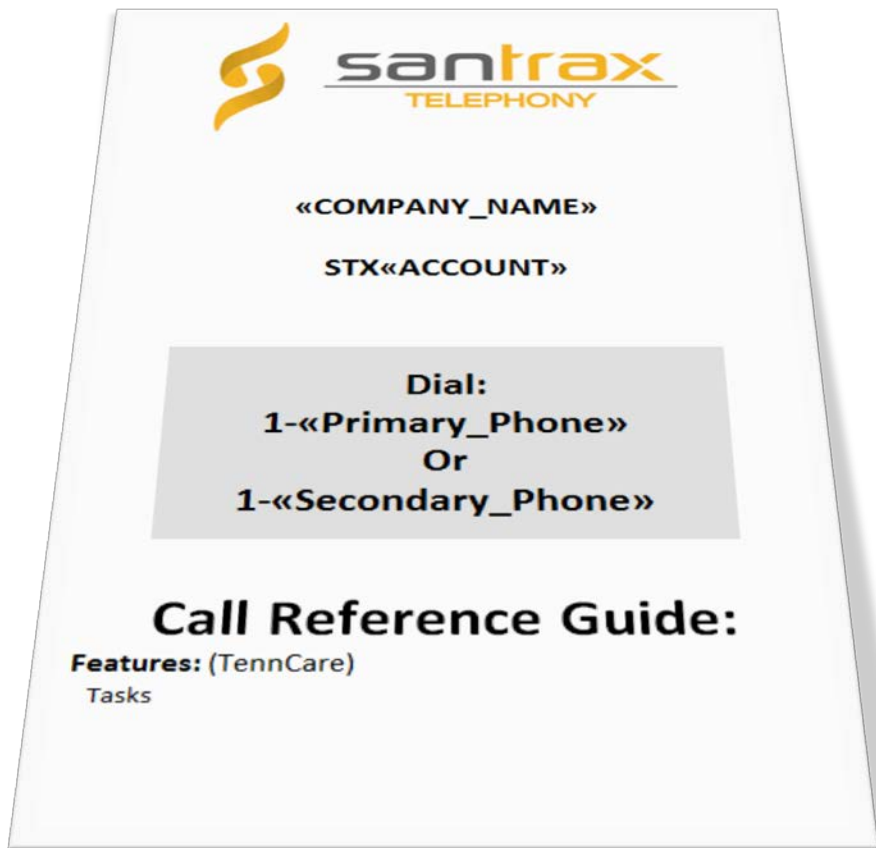
7. The visit can then be conducted and completed as you would a scheduled visit.

*** Note:** *After the first time you've searched for a patient, that patient will appear in the Patient List for future unscheduled visits.*



EVV TELEPHONY CALL PROCESS

Telephony Call Reference Guide



- The Telephony Call process should be the secondary choice / backup to the Mobile Visit Verification process.
- 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 to ensure continuous service.
- Call Reference Guide will be sent via email as part of the Welcome Kit upon completion of training.

Calling Instructions

STX####

Calling in: when arriving at the client's home, follow steps 1 – 3.

Calling out: when leaving the client's home, follow steps 1 – 6.

Make sure you have the following information:

- Your Santrax ID.
- A list of tasks that were performed during the visit.

Remember: When speaking to Santrax, speak slowly and clearly, one digit at a time (e.g., 1475 = one, four, seven, five).

1.  **Dial any of the toll-free numbers assigned to your agency.**

 The Santrax system will say: "Welcome, please enter your Santrax ID."

If you are experiencing difficulties with the primary toll-free number, please utilize the secondary toll-free number

2.  **Press the numbers of your Santrax ID on the touch tone phone.**

You also have the option to speak your Santrax ID slowly and clearly one digit at a time, if using one of your English toll-free lines.

Write your ID number above for easy reference

 The Santrax system will say: "Please say your First and Last Name, and Santrax ID."

3.  **Say your First and Last Name, and Santrax ID.**

 When your identity has been verified, Santrax will say: "Received at (TIME)"

****When calling in upon arrival, hang up after the system gives you the call (TIME).****

Calling Instructions

STX####

 The Santrax system will say "Enter number of tasks"

4.  **Press the total number of tasks performed for the client**

 The Santrax system will say "Enter task ID"

5.  **Press the Task Number you performed.**

If you performed more than one task wait for the system to confirm the task and then enter the next task number.

****Note:** Repeat step 5 until you have completed entering all tasks. If you made a mistake entering Tasks, Press or Say "Zero, Zero", the system will confirm by saying: "Starting Over, Enter Task ID". Enter all tasks ID's again.

 The Santrax system will say: "Received (NUMBER) task(s)."

6.  **Hang up**

What to do if there is a problem.

- ⚡ Busy Signal
- ⚡ No Answer

1. Check the number to make sure you have the right phone number.
2. Try calling again.
3. Try calling the secondary toll-free number provided.

- ⚡ If the system still says: "Sorry, Invalid Number,":

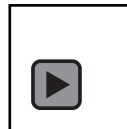
1. See if the phone has a T-P (Tone-to-Pulse) switch; make sure the switch is on T. If there is no switch, you must say your ID number one digit at a time, into the phone after the tone.

- ⚡ If you still cannot complete the call, contact your supervisor or CDS Employer.

DO NOT ATTEMPT TO CALL INTO THE SYSTEM AGAIN FOR THIS CALL.

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. Santrax will confirm the call time
4. The caregiver will 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. Santrax will confirm the call time and prompt to enter the number of tasks performed.
4. Santrax will prompt the caregiver to enter the total number of tasks performed.
5. The caregiver will then enter the total number of tasks and each Task ID.
6. Santrax will repeat the Task description.
7. Each Task ID will be entered until complete.



Task ID	Description	Task ID	Description
Assistance		Member Monitoring	
10	Grocery Shop	50	Blood Pressure
11	Exercise (Walking Only)	51	Oral Temp
12	Assist w/ Treatments	52	Pulse
13	Shopping/Errands	53	Respirations
14	Accompany to Doctor	54	Weight
15	Pickup Medications	55	Record Food Intake
16	Escort	56	Record Fluid Intake
18	Medication Reminders	57	Record B.M.
19	Budget Management	Other	
Bathing/Personal Hygiene		60	Other Activities
20	Shaving/Oral Care	61	Education of Caregivers
21	Dressing	62	Service Animal Care
22	Foot Care	Safety	
23	Bathing	70	Assess Safety Status of Residence
24	Routine Hair and Skin Care	Toileting	
25	Nail Care	80	Empty Colostomy Bag
Housekeeping		81	Catheter Care
30	Change Linen	82	Toileting
31	Laundry	83	Hygiene in Toileting
33	Cleaning Living Areas	84	Toilet Scheduling
34	Clean Kitchen	85	Assist w/ Scheduling
35	Clean Bathroom	86	Teach and Train
36	Dusting	89	Assist w/Bedpan
37	Mopping	Transfers/Ambulation	
38	Vacuuming	90	Ambulate Client w/Cane
39	Trash Removal	91	Ambulate
Meal Preparation		92	Ambulate Client w/Walker
40	Feeding/Eating	93	Transfer and Ambulation(walking)
41	Meal Preparation	94	Turn and Position every 2 hours
42	Meal Delivery x 1	95	Balance
43	Meal Delivery x 7	96	Hoyer Lift
49	Meal Planning	98	Position/Apply Assistive Device
		99	Assist w/Braces/Prostheses

Multiple Clients with same phone number

Scenario # 1: Alternating Clients Sequentially

Schedule Example:

Client A: 9:00 – 10:00 (Attendant Care)

Client B: 10:00 – 11:00 (Personal Care)

STEP 1:

1st Call 9:00 a.m.: WHEN YOU ARRIVE AT 9:00 A.M. AND ARE READY TO BEGIN SERVICING CLIENT # “A” FOR ATTENDANT CARE...

- ◆ Dial **1-877-xxx-xxxx** and LISTEN to the Santrax Welcome. Enter your Santrax ID # _____. The system will say, “Received at (TIME)”.
- ◆ Ignore message to enter number of tasks and instead enter “##” then enter client “A” ID #: _____
- ◆ Hang up.

Multiple Clients with same phone number

STEP 2:

2nd Call 10:00 a.m. (WHEN COMPLETING ATTENDANT CARE SERVICE FOR CLIENT # “A” AND BEGINNING PERSONAL CARE SERVICE FOR CLIENT # “B”)

- ◆ Dial **1-877-xxx-xxxx** and LISTEN to the Santrax Welcome. Enter your Santrax ID # _____. The system will say, “Received at (TIME)”.
- ◆ Ignore message to enter number of tasks and instead enter “##” then enter client “A” ID #: _____
- ◆ The system will once again prompt you to, Enter # of Tasks (Example: 2), enter two.
- ◆ Enter Task ID: (Example: 89 – Assist with Bedpan (System will repeat back Assist with Bedpan) and 91 – Ambulate (System will repeat back Ambulate)).
- ◆ System will ask: Enter 2nd Client ID #.
- ◆ Enter 2nd Client ID # (ignore task request) just HANG UP.

Multiple Clients with same phone number

STEP 3:

3rd Call: 11:00 a.m: WHEN YOU ARE DONE WITH CLIENT “B’s” PERSONAL CARE SERVICE AND ARE READY TO LEAVE THE CLIENT’S HOME.

- ◆ Dial **1-877-xxx-xxxx** and LISTEN to the Santrax Welcome. Enter your Santrax ID # _____. The system will say, “Received at (TIME)”.
- ◆ Ignore message to enter number of tasks and instead enter “##” then enter client “B’s” ID #: _____
- ◆ The system will once again prompt you to, Enter # of Tasks (Example: 2), enter two.
- ◆ Enter Task ID: (Example: 20 - Shaving/Oral Care (System will repeat back Shaving/Oral Care) and 23 – Bathing (System will repeat back Bathing).
- ◆ YOU ARE DONE....

Multiple Clients with same phone number

Locating Client ID

The Client ID can be found in the 'Client Addresses Report'. To access the Client Address Report, go to Main Menu > Client > Client Addresses > Preview

Client Addresses

Client Status = '02-Active'

Name	ChartID	Site ClientID	Phone	SOC	Address
Aaronson, Jane Q.	C9720863-AC	9720863	(615) 555-7894	3/1/10	70 Happy Hill Road, Chattanooga, TN 37401
ACO, AMELIA	B0001001-AG	9720813	(516) 859-1048	1/17/10	1688 Main Street 11B, Brentwood, TN 37027
ADA, ANA	B0001002-AC	9720763	(516) 358-3603	1/17/10	3916 Main Street 2C, Brentwood, TN 37027
ADA, CARMEN	B0002061-AC	9720774	(631) 694-6842	1/17/10	6487 South Street 2ND FL, Brentwood, TN 37027
Alebrande, Heather	C9720872-AG	9720872	(516) 851-0747	5/1/10	10 Hill Top Blvd, Johnson City, TN 37602

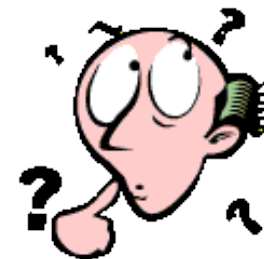
Call Process - Helpful Hints



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.*

THANK YOU FOR YOUR TIME!

