WHAT IS "AT YOUR FINGERTIPS"?

"At Your Fingertips" is a bi-monthly tip sheet to help providers navigate Electronic Visit Verification (EVV) by answering common questions and providing assistance for resolving common issues encountered by providers in their use of the EVV system.

This tip provides information on the On Hold and Pending Services with Exceptions Report. It will teach you how to run this report and use the information provided to effectively prepare visits for the claim export process.

Not sure who to contact when you have a question or issue, or if your issue needs to be escalated?

Contact DXC Technology via e-mail to: ctevv@dxc.com

**Please only send client PHI in an encrypted/ secured email.**

EVV TIP # 9
ON HOLD AND PENDING SERVICES WITH EXCEPTIONS REPORT

WHAT IS THE "ON HOLD AND PENDING SERVICES WITH EXCEPTIONS" REPORT?

The On Hold and Pending Services with Exceptions Report allows you to see outstanding exceptions attached to a visit that need to be resolved before the visit can be exported for adjudication. The exceptions identified on the visit will need to be resolved in order for the visit to be "OK to Bill" and able to be exported from the Santrax system.

HOW DO I ACCESS THE REPORT?

1. **Access the Report.** Go to the "Reports" tab, select "Scheduling" and then select "On Hold and Pending Services with Exceptions".
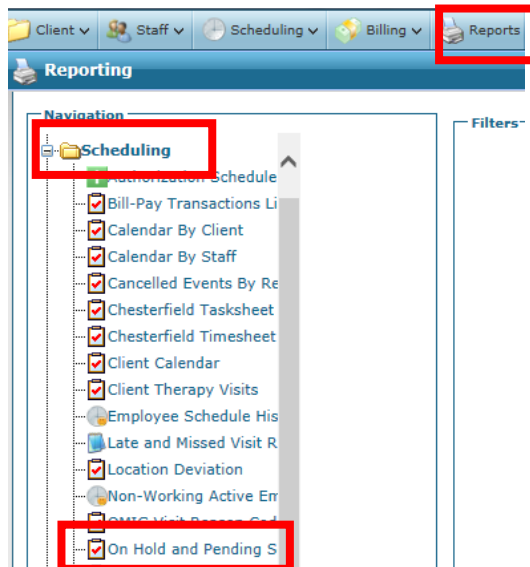
2. **Filter your Data and Search.** You can run the report with specific search criteria to provide a narrow range of data. In the example below the provider has restricted the returned data to one date of service.

The report can be generated by the following fields:

Field	Description
Company	The selected company
Location	The selected location
Admit Type	The selected admit type
Team	The selected team
Payor	The selected payer
Client	The selected client admission record
Exception	Schedules with the selected exception
Date From	Results within the entered/selected date range
Date To	

3. **Read your Data.** The report that is generated will tell you which visits and services have exceptions based on your search criteria. In the excerpt below the only criteria was one date of service. As a result, the resulting report has all the visit exceptions for visits in a "hold" or "pending" status for only that date of service. The provider is now able to clearly see which visits require further intervention prior to claim export.

On Hold and Pending Services With Exceptions

Admit Type = 'DSS- Dept of Social Services', From 10/04/2017 To 10/04/2017 11:59 PM

Client Name	Client OtherID	Schedule Date	Service	Status	Exceptions
G		10/4/2017 12:00:00	HMK	Pending	
G		10/4/2017 12:00:00	HMK	Hold	Actual Hours More Than Scheduled Hours
L		10/4/2017 12:00:00	HMK	Pending	
L		10/4/2017 12:00:00	HMK	Pending	
N		10/4/2017 12:00:00	COM	Hold	Actual Hours More Than Scheduled Hours
O		10/4/2017 12:00:00	COM	Hold	No Show Exception

Total Clients : 6
Total Services on Hold : 3
Total Services Pending : 3

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Report Output
Each column of the report displays:

Columns	Description
Client Name	The name of the client (last name, first name)
Client Other ID	The Other ID from the client's profile
Schedule Date	The date of the related schedule
Service	The schedules assigned service
Status	The schedules status
Exceptions	All exceptions affiliated with the schedule