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 explains the new Temporary Client enhancement.

Previously published tips can be found on the Electronic Visit Verification (EVV) Important Message located under the subheading ‘At Your Fingertips’. The EVV Important Message can be found at www.ctdssmap.com.

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 # 21

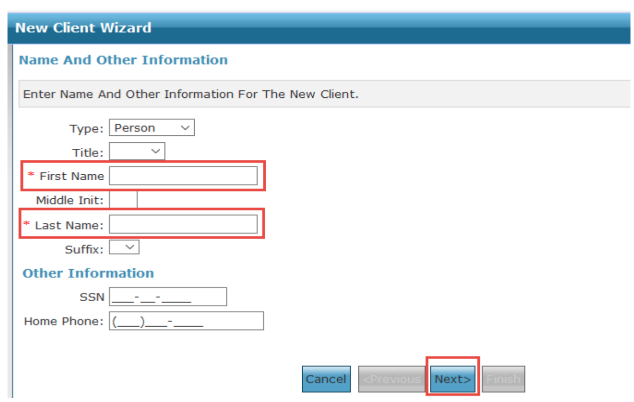
ADDING A TEMPORARY CLIENT IN SANTRAX

When a client does not have a Prior Authorization (PA) in an approved status on the DSS secure site (www.ctdssmap.com) or is not eligible on an EVV mandated waiver benefit plan, they are not automatically uploaded into Santrax. As a result, the client cannot be scheduled, and while the caregiver can utilize telephony to check-in or check-out of the visit, a Fixed Visit Verification (FVV) device cannot be ordered for the client and the caregiver cannot use Mobile Visit Verification (MVV). Based on provider feedback, the Department of Social Services (DSS) has implemented an enhancement to the EVV program that allows providers to create a temporary client in the Santrax system.

The Temporary Client enhancement allows office staff to enter a temporary client directly in the Santrax system, which in turn allows them to immediately schedule visits and resolve visit exceptions for clients who are not yet present in Santrax via the automatic state upload. It also allows the client’s caregiver to utilize all the check-in and check-out features available.

It is important to note that claims for a client added using the Temporary Client enhancement **cannot be billed** until the client has been uploaded to Santrax and their visits confirmed.

HOW DO I USE THE TEMPORARY CLIENT ENHANCEMENT?



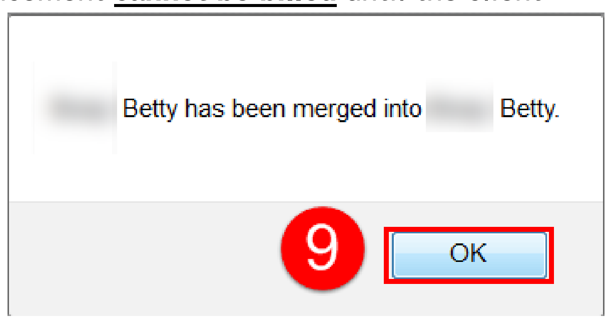
The steps below are necessary to use the Temporary Client enhancement. For more information regarding each step, please see the temporary client enhancement training documents which can be found on the Electronic Visit Verification (EVV) Important Message found at www.ctdssmap.com. If, after reviewing the documentation, you need assistance in using this enhancement, please contact Sandata Customer Care at 1-855-399-8050.

1. Assign Security/Group Permissions – Only authorized users can create and manually merge temporary clients.
   i) Assign Temporary Client permission to the office staff member
2. Add new client
   i) Search to make sure client doesn't already exist using the Medicaid ID number. Make sure to change the Status field to blank prior to searching.
   ii) Click new client button and proceed through and complete the New Client Wizard
3. Navigate to Personal screen. The following data fields must be populated:
   i) Address including zip code and zip+4
   ii) Phone number
   iii) Other ID (Client's Medicaid ID)

   NOTE: The client's DOB is intentionally grayed out in this process for adding a temporary client. This field is not an editable field and is not required in the merge process.
4. Navigate to General screen and add:
   i) Coordinator
   ii) Change admission status to active
   iii) Add service. (If client has multiple services, all services must be added to the client's profile for a successful automatic merge.)
   iv) Save
5. Manually merge clients (When imported client becomes present in Santrax)
   i) Search for client using their Medicaid ID number. (Remember change status to 01-Pending). Both temporary client and imported clients are visible.)
6. Navigate to Admin>System Tools>Merge Client
   i) Select the imported client (KEEP)
   ii) Select the temporary client (MERGE)
   iii) Click Merge
7. Refresh all visits in order to avoid claim denials
   i) Navigate to Billing>Billing Review
   ii) Filter visits for merged client
   iii) Refresh all visits by clicking Update

WHAT SHOULD I REMEMBER WHEN USING THE TEMPORARY CLIENT ENHANCEMENT?

1. Claims for a client added using the Temporary Client enhancement **cannot be billed** until the client records have been merged in Santrax and their visit(s) confirmed.
2. In the event that the automatic Merge feature does not successfully merge temporary and imported clients, the office staff is required to manually merge the client.
3. To use the Temporary Client enhancement, the office staff must be assigned to the "Temporary Client" security group.



4. Auto-merge will occur only if the following fields agree for both the temporary and imported client: client first and last name, Medicaid ID, admission type and authorized services. The client must be in an **active** status.
5. Any visit that is confirmed prior to the merge process must be refreshed in order to associate the PA to the visit. Failure to refresh these visits will cause the visit to remain 'Not OK to Bill".

WHERE CAN I GO FOR MORE INFORMATION?

To reference the temporary client enhancement training PowerPoint slide deck and checklist, please refer to the on the EVV Implementation Important Message found at www.ctdssmap.com . The training documents provide a more thorough training in the temporary client enhancement than what is provided on this tip sheet.