# Our Visit Maintenance Q&A Webinar Will Begin Shortly

# Accessibility Options

Enabling Closed Caption

- This webinar is being recorded. We will email the recording and slides after the session.

- Your camera and mics are turned off.

- Q&A will be answered throughout the presentation. Please submit your questions in the Q&A box by selecting the Q&A button at the bottom of the screen to pop out this box.

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Ohio
Department of Medicaid

# Visit Maintenance Q&A

February 2026

# Claims Validation Implementation Phases



EVV Claims Adjudication Phases — Ohio Department of Medicaid

| PHASE 1 March 1, 2025 | PHASE 2 June 1, 2025 | PHASE 3 June 1, 2025 | PHASE 4 August 1, 2025 | PHASE 5 October 1, 2025 | PHASE 6 January 1, 2026 | PHASE 7 March 1, 2026 |
|---|---|---|---|---|---|---|
| Billed to ODM FFS | | Billed to Next Gen MCEs | | Billed to DODD | Billed to ODM or AGE | Billed to MyCare |
| HOME HEALTH SERVICES | PRIVATE DUTY NURSING, NURSE ASSESSMENT AND CONSULT | HOME HEALTH SERVICES | PRIVATE DUTY NURSING NURSE ASSESSMENT AND CONSULT | IO, Level 1, SELF WAIVER PROGRAM SERVICES | OHIO HOME CARE, PASSPORT WAIVER SERVICES | HOME HEALTH PDN, NURSE ASSESSMENT AND CONSULT, WAIVER SERVICES |

*Based on claim line date of service.
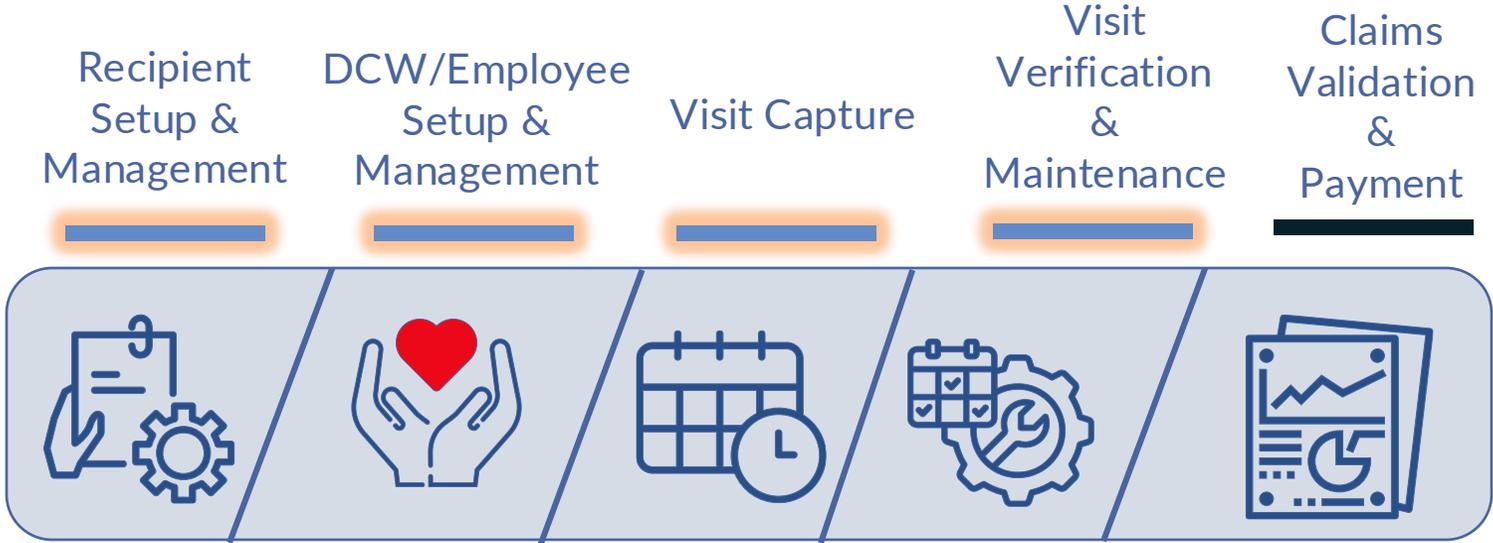
# List of Services MyCare Ohio Plans

- G0151
- G0152
- G0153
- G0156
- G0299
- G0300
- T1000

- T1001
- T1001_U9
- S5125
- T1002
- T1003
- T1019
- T2025
- ECL

Link to list of Services: ODM_EVV_Covered_Programs_and_Services.pdf

# EVV Tracker

Recipient Setup & Management

DCW/Employee Setup & Management

Visit Capture

Visit Verification & Maintenance

Claims Validation & Payment

# Agenda – Visit Maintenance Q&A

› How to Review all Exceptions on Visit

› Where to Locate previously recorded trainings

› Recommended timeframe to perform Visit Maintenance

› Live In Caregivers

› How to resolve an Unauthorized Service Exception

› How to adjust a call in/out

› Difference between Create Call and Create Visit

› Support Resources

# What Happens during the Claims Validation Process?

**Step 1:** DCW captures the visit using Sandata Mobile Connect (SMC) app, Telephonic Visit Verification (TVV), or provider manually creates
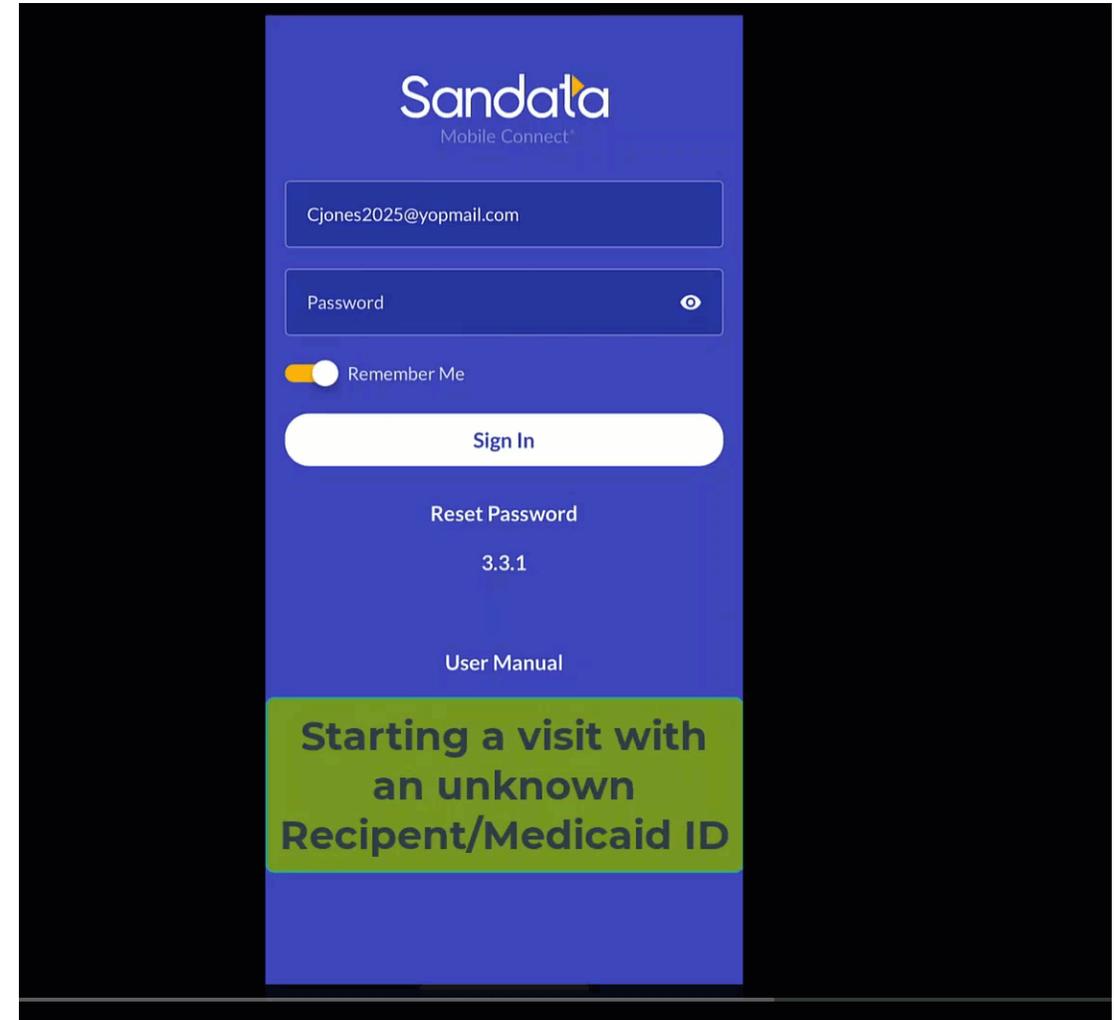
# What Happens During the Claims Validation Process?.

**Step 2:** Provider performs visit maintenance and resolves any visit exceptions in their Sandata EVV system. Provider confirms visits are in a verified status prior to submitting claims.
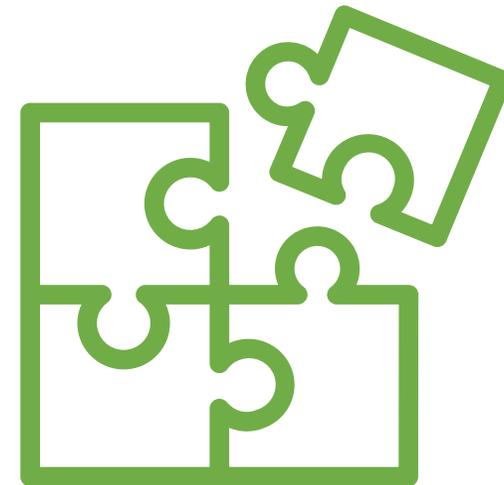
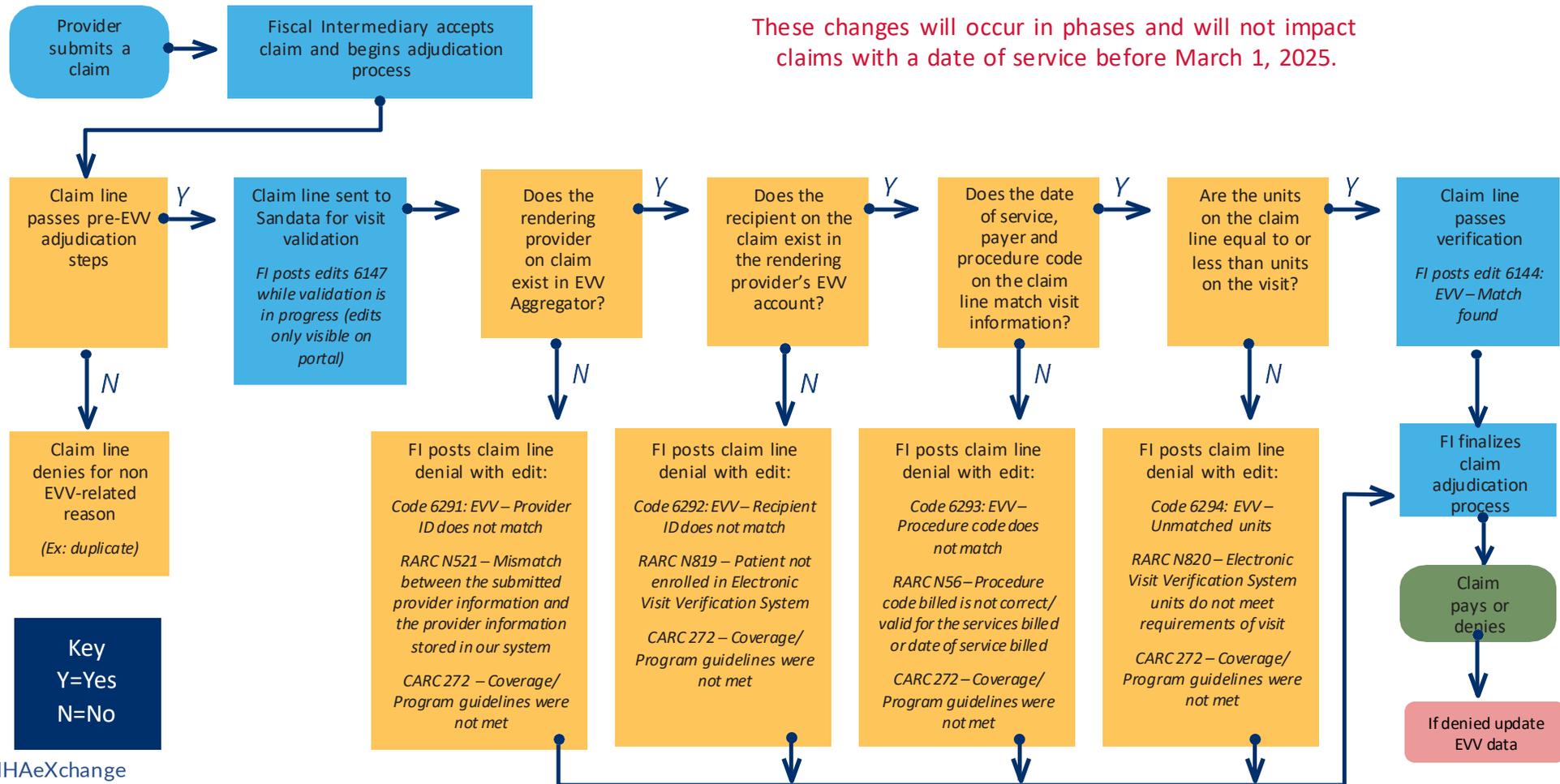**Step 3:** Payer can now match claims to EVV visits.

# Electronic Visit Verification Claims Validation Process

## ELECTRONIC VISIT VERIFICATION CLAIMS VALIDATION PROCESS

These changes will occur in phases and will not impact claims with a date of service before March 1, 2025.

Provider submits a claim → Fiscal Intermediary accepts claim and begins adjudication process

**Claim line passes pre-EVV adjudication steps**
- Y → Claim line sent to Sandata for visit validation
  - *FI posts edits 6147 while validation is in progress (edits only visible on portal)*
- N → Claim line denies for non EVV-related reason *(Ex: duplicate)*

**Claim line sent to Sandata for visit validation** → **Does the rendering provider on claim exist in EVV Aggregator?**
- Y → Does the recipient on the claim exist in the rendering provider's EVV account?
- N → FI posts claim line denial with edit:
  - *Code 6291: EVV – Provider ID does not match*
  - *RARC N521 – Mismatch between the submitted provider information and the provider information stored in our system*
  - *CARC 272 – Coverage/Program guidelines were not met*

**Does the recipient on the claim exist in the rendering provider's EVV account?**
- Y → Does the date of service, payer and procedure code on the claim line match visit information?
- N → FI posts claim line denial with edit:
  - *Code 6292: EVV – Recipient ID does not match*
  - *RARC N819 – Patient not enrolled in Electronic Visit Verification System*
  - *CARC 272 – Coverage/Program guidelines were not met*

**Does the date of service, payer and procedure code on the claim line match visit information?**
- Y → Are the units on the claim line equal to or less than units on the visit?
- N → FI posts claim line denial with edit:
  - *Code 6293: EVV – Procedure code does not match*
  - *RARC N56 – Procedure code billed is not correct/ valid for the services billed or date of service billed*
  - *CARC 272 – Coverage/Program guidelines were not met*

**Are the units on the claim line equal to or less than units on the visit?**
- Y → Claim line passes verification
  - *FI posts edit 6144: EVV – Match found*
- N → FI posts claim line denial with edit:
  - *Code 6294: EVV – Unmatched units*
  - *RARC N820 – Electronic Visit Verification System units do not meet requirements of visit*
  - *CARC 272 – Coverage/Program guidelines were not met*

**Claim line passes verification** → FI finalizes claim adjudication process → Claim pays or denies → If denied update EVV data

**Key**
Y=Yes
N=No

# What is an Exception?

An exception occurs when one of the required EVV elements is missing or incorrect, such as the Recipient ID, DCW/Employee ID, Service, Location, Date or Start and End time of service.

# How to Review all Exceptions on a Visit

# Question: How to Review all Exceptions

**Question**: I fixed all the exceptions with a red warning, but the visit is still in the incomplete status

**Answer**: Go into Visit Detail and go to Exception tab to see if there are any other exceptions.

**Steps**:
1. Navigate to Visit Maintenance and locate visit
2. Select Visit Date to open Visit Details
3. Select Exceptions tab in Visit Details

# How to Review all Exceptions on a Visit Demo

# Question: Where can I locate previously recorded trainings

**Question:** Where can previous webinar recordings be found

**Answer:** Ohio Agency Provider Training – Sandata Technologies

# Recommended timeframe to perform Visit Maintenance

# Question: What is the Recommended timeframe to perform Visit Maintenance?

**Question:** How often should I perform Visit Maintenance?

**Answer:** We recommend performing Visit Maintenance on a daily basis.

**Steps**:

1. Navigate to the Visit Maintenance module
2. You will see exceptions from the current day.
**Note**: Use the filter button to change date range.

# How to use Filters in Visit Maintenance Demo

# Live In Caregivers

# Live-In Caregiver Exemption

**Does the provider live in the same household as the waiver recipient?**

If you answered **Yes**, and it is documented in the person's OhioISP, the provider may be exempt from Ohio Department of Medicaid EVV requirements.

See links for more details:
[EVV Live-In Caregiver Exemption Information PDF](#)

[Live-In Caregiver Exemption Form](#)

# How to resolve an Unauthorized Service Exception

# Unauthorized Service Exception

**Cause**: This error could be caused by a variety of issues including:

- Missing, incorrect or expired EVV authorization

- Missing or incorrect service code

- Missing or incorrect Payer and/or Program

- Reusing an authorization from a previous Payer and not creating a new authorization for new Payer

**Example:** DCW/Employee selects the incorrect service during an unknown visit.

**Resolution**: Verify the EVV authorization on the Recipient is entered and correct. If the EVV authorization is correct, update the service on the call to match.

| RECIPIENT NAME | DCW/EMPLOYEE NAME | PAYER | SERVICE | VISIT DATE | SCHEDULED TIME IN | SCHEDULED TIME OUT | SCHEDULED HOURS | CALL IN | CALL OUT | CALL HOURS | ADJUSTED IN | ADJUSTED OUT | ADJUSTED HOURS | PAY HOURS | VISIT STATUS | DO NOT BILL | UNITS |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bull, Elaine | Trainer, OHIOProvider | | MyCare - PCA (T1019) | 12/16/2024 | | | | ● | 03:27 PM | | | 03:27 PM | | [ --- ] | Incomplete | ☐ | |

*Note: This is mock data that is used only for training purposes.*

# Steps to Resolve Unauthorized Service Exception

1. Navigate to **Visit Maintenance** and locate visit.

2. Select the red dot under the **Service** column

3. Review the **Recipient name, Payer, Program, and Service** associated to this visit.

4. Navigate to **Recipient > Recipient Management** and locate the Recipient using Quick Search or Filters.

5. Select **Recipient Name** to view their record; select the **Program** tab.

6. Confirm that the **Payer, Program, Service and Authorizations** are entered and correct. If not, make required changes.

7. If the information is correct, return to Visit Maintenance; on the **General** tab of the visit, make necessary corrections to the **Payer, Program, and Service.**

8. Select **Reason Code**, enter reason note (optional), and select **Save.**

# How to resolve an Unauthorized Service Exception Demo

evv-ui.sandata.com/visit-maintenance

New Chrome available

**Sandata** Home Care

Visit Maintenance / **Manage Visits**

Account: 43866 - HHAX Training - ALCORDOVA@HHAEXCHANGE.COM

Select Agency    ⟶ LOG OUT

🔍 Navigate Modules

▦ Dashboard

👥 Recipients ▼

🗐 DCW/Employees

📅 Scheduling ▼

⚙ Visit Maintenance

📊 Reports ▼

🔗 XREF

🔒 Security ▼

💬 Messaging

CREATE VISIT    CREATE CALL

🔽 FILTERS    ☰ SHOW DISPLAY OPTIONS    🗎 EXPORT DATA ▼

Show Legend

APPROVE ALL    DISAPPROVE ALL

| RECIPIENT NAME | DCW/EMPLOYEE NAME | SERVICE | VISIT DATE | SCHEDULED TIME IN | SCHEDULED TIME OUT | SCHEDULED HOURS | CALL IN | CALL OUT | CALL HOURS | ADJUSTED IN | ADJUSTED OUT | A H |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| HHAeXchange, Harold | Dowdrick, Eric | HPC | 10/31/2025 | | | | 11:19 AM | 12:00 PM | 00:41 | 11:19 AM | 12:00 PM | |
| Doe, Jane | Dowdrick, Eric | HPC 🔴 | 10/31/2025 | | | | 11:11 AM | 11:19 AM | 00:08 | 11:11 AM | 11:19 AM | |
| Sandata, Sandy | Dowdrick, Eric | RN Consultation (T1001) 🔴 | 10/31/2025 🟡 | | | | 06:00 AM | 07:00 AM | 01:00 | 06:00 AM | 07:00 AM | |
| Sandata, Sandy | Cordova, Alejandra | SPHH Aide (G0156) | 10/30/2025 🟡 | | | | 08:27 AM | 09:00 AM | 00:33 | 08:27 AM | 09:00 AM | |
| | | | | | | | | | **Total: 02:22** | | | |

25 ▼    of 4 entries

« ‹ 1 › »

https://evv-ui.sandata.com/visit-maintenance

# How to adjust a Call In/Out

# Question: How do I adjust a Call In/Out?

**Question**: My DCW was unable to clock in because they needed to tend to the recipient immediately. Once the situation was under control the DCW clocked in, but it was a half hour after they first got there. How can I change the In call to the actual time the DCW arrived?

**Answer**: You need to locate the visit and adjust the In time

**Steps**:

1. Locate visit in Visit Maintenance and select the visit date to open Visit Details
2. On the General tab enter the correct time in in the Adjusted In field
3. Select the Reason Code, enter Reason Note (optional) and select Save

# How to adjust In/Out Call Demo

What is the Difference between Create Call and Create Visit

# Question: What is the Difference between Create Call and Create Visit?

**Question**: On Visit Maintenance there is a create Visit option and a Create Call option. What is the difference between the two?

**Answer**: Create Visit allows you to manually create a visit where the DCW did not clock In or Out.

Create Call allows you to clock In a DCW – which would allow them to clock out using the Sandata mobile app or Telephony.

**Steps**:

1. On Visit Maintenance select either Create Visit or Create Call

# How to Create Visit and Create Call Demo

# Additional Resources

# Provider Resources

- Ohio User Guides

**Top Visit Maintenance Errors and How to Resolve:**

- Managing Exceptions

- Updating an Unknown Recipient

- Adjusting Call Times and Dates

- Ohio Claims Validation: Handling Claims Denials- Sandata Technologies

**DODD Resources:**

DODD Workflow

Recorded Webinars

DODD Webpage

# EVV Support

**Need Assistance?**
- Contact the EVV Provider Hotline at 855-805-3505 [Submit a Zendesk Ticket](#)
  - Ensure that you have your STX (account #) when calling hotline or submitting ticket!
- Attend Daily Office Hours – [Register for ODM EVV Office Hours](#)!

**Alt EVV Providers – need help?**
For additional support, please contact the Technical Support Alternate EVV team at either options below:

- Phone: 1-844-289-4246

- Email: [OHAltEVV@Sandata.com](mailto:OHAltEVV@Sandata.com)

- Include the following in the email:

- ✓ Provider Medicaid ID

- ✓ Alt EVV Vendor

- ✓ Include Examples (Universal Unique Identifier, copy of payloads) - **ensure this is sent securely via Zendesk portal if there is PHI data.**
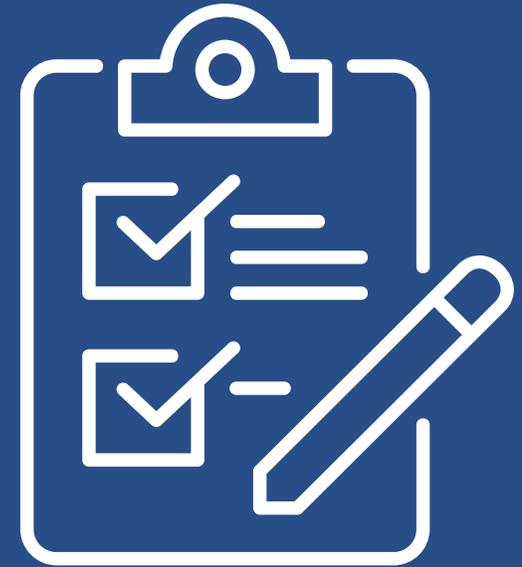
**Ohio Department of Medicaid**
- [Ohio Department of Medicaid Website](#)
- [Electronic Visit Verification](#)

# Questions?