# Electronic Visit Verification (EVV) Phase II

March 30, 2022

# Agenda

- Home Health Care Initiative & Implementation

- CalEVV Training

- Alternate EVV

- Client-Payer Association

- Provider ID Maintenance

- Visit Maintenance

- FAQ

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- Resources

# Home Health Care Services (HHCS) Initiative & Implementation

# Home Health Care Services (HHCS) Initiative & Implementation

- HHCS is anticipated to be implemented by January 1, 2023.
- HHCS Definition as defined by the Code of Federal Regulations:
  - Home Health Services are defined as services that are provided to a beneficiary at their place of residence and on orders written by a physician, nurse practitioner, clinical nurse specialist or physician assistant, as part of a written plan of care that the ordering practitioner reviews every 60 days for services[1].
- [Provider Types and Codes Policy Document](#)
  - Includes HHCS codes subject to EVV

1. Code of Federal Regulations: eCFR :: 42 CFR 440.70 -- Home health services.

# Home Health Care Services (HHCS) Initiative & Implementation

- Certified Nursing Assistant
- Home Health Aide
- Direct Skilled Nursing Care
- Occupational Therapy
- Physical Therapy
- Private Duty Nursing
- Speech Therapy

# Home Health Care Services (HHCS) Initiative & Implementation

- DHCS HHCS Impacted Programs:
  - Managed Care
  - Home & Community-Based Alternatives Waiver Programs
  - California Children's Services (CCS)
- Additional Impacted Programs:
  - DDS 1915(c) Home and Community-Based Waivers, including the Self-Determination Program
  - DDS 1915(i) State Plan Amendment
  - DHCS 1915(c) Home and Community-Based Alternative Waiver
  - DHCS Home Health Care Services
  - CDA/DHCS Community Based Adult Services (CBAS) program 1115 Waiver
  - CDPH/DHCS 1915(c) Medi-Cal Waiver Program MCWP

# Managed Care Personal Care Services (PCS)

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- The Managed Care Plan inclusion in the CalEVV Phase II of PCS will include Community Supports formally know as In Lieu of Services
  - These are services or settings that Managed Care Plans may offer in place of services or settings and that are a medically appropriate and cost effective alternative to a Covered Service.
- We will be working with our Managed Care Plan partners to identify a complete listing of the proposed services that are considered to be Personal Care Services and will provide communication on next steps in further email communications and webinars.

# CalEVV Training

# CalEVV Training

**Aggregator Training**

- The Sandata aggregator is a web-based portal that is used to view provider EVV visit information. This includes visits, and visit exceptions, as well as client, employee, and user data from the provider accounts.
- These tools allow access to ensure that providers are adhering to state and federal requirements as indicated in Information Notice 22-01.
- Training is for Jurisdictional Entities (JE) only.
- This training will help JEs ensure that Caregivers and Providers Agencies are entering all required data elements by monitoring for compliance.
- When a caregiver completes a home visit, the 6 data elements are automatically and securely uploaded into the CalEVV aggregator.
  - Providers Agencies are not required to email EVV information to departments.
- The Aggregator training is tentatively scheduled for **April or early May 2022**.
- Videos of all live training webinar sessions will be posted soon.

# Alternate EVV

# Alternate EVV

- Provider Agencies using an Alternate EVV system will need to select "No" for using CalEVV.

- Please specify the Software Vendor that will be collecting and sending the visit data.

- Click Submit when done. This will initiate the Alternate EVV certification process.

- Alt EVV systems must meet the requirements and specifications found in the following documents:
  - Specification User Guide
  - Alternate EVV Vendor Specifications

Additional Information

For the California EVV Phase II Program, providers have the option to use CalEVV (the State provided EVV system) or an alternate EVV system.

If you will be using the CalEVV system, you can provide your member and caregiver information using CalEVV's data entry tool; via upload from your Agency Management system; or using an Excel spreadsheet tool which will be provided.

For Provider Agencies wishing to use an alternate EVV system, please select "NO" and specify the Software Vendor who will be collecting and transmitting your visit data.

WILL YOUR AGENCY BE USING CALEVV TO ELECTRONICALLY COLLECT VISIT DATA? *

○ YES  ● NO  ○ UNKNOWN

WHAT SYSTEM WILL YOU BE USING TO ELECTRONICALLY COLLECT VISIT DATA? *
enter software vendor and product name here

Maximum Characters Allowed: 100                    0/100

# Alternate EVV

**Alternate EVV Email and Test Instructions**
- After you have clicked "Submit" and initiated the Alternate EVV certification process, you **and** your software vendor will receive an **email** with **instructions** that include:
  - Testing credentials and a testing certification checklist from Sandata.
- The checklist will guide you through what must be included in the files and uploaded during testing.
- Testing can begin upon receipt of the information.
- If testing is unsuccessful, Sandata will return the checklist marked with erroneous files/scenarios to the Alternate EVV vendor.
- Tests can be resubmitted until all errors have been corrected.
- Upon completion of the testing checklist, the Alternate EVV vendor should email Sandata at [CAAlternateEVV@sandata.com](mailto:CAAlternateEVV@sandata.com) to request the testing validation.
- The CalEVV Customer Support team will work with the Alternate EVV system vendor to conduct testing and set up a connection to the CalEVV Aggregator.
- Alternate EVV data is submitted to the aggregator on a daily basis.

# Client-Payer Association

# Client-Payer Association

- Allows the Provider Agency to associate the client with the appropriate jurisdictions and services.
- Creates a basic EVV-system 'authorization' record: This 'authorization' is limited to payer, program, service, jurisdiction, start date and end date.

**Purpose:**
- For the Provider Agency
  - Defines in EVV which services are available for the recipients in their care.
- For the Caregiver
  - Limits the initial list of services for the recipient within Sandata Mobile Connect application and telephony to make selecting the appropriate service easier for the caregiver
- For the Jurisdiction
  - Allows the association of the recipients and visits to the appropriate Jurisdictional Entity. Makes them visible to the JE via the Aggregator.

# Client-Payer Association

- Alternate EVV vendors provide this via the Application Programming Interface (API).
- CalEVV users can enter this manually, or as part of a manual bulk upload. Manual bulk. upload allows for users to upload an excel file into the Sandata system to quickly add large amounts of client/employee records.
- The CalEVV system will allow visits to be captured with no client/payer segment in place.

# Provider ID Maintenance

# Provider ID Maintenance

- This feature will allow users to add, edit/correct, or delete the provider identifiers associated with their accounts.
- This is an alternative method to correcting Provider Identifiers and eliminates the need to complete a support ticket for Provider Identifiers to be edited.
- This feature is available to both CalEVV and Alternate EVV users. (Alternate EVV solution users can log into the Aggregator to add/edit/delete provider identifiers).
- Users with the "administrator" role will have privileges to add, edit/correct, and delete and can grant privileges to others within their agency.
- To use this feature, log into CalEVV, go to Security on the left menu, and then to Manage Provider Identifiers.

# Visit Maintenance

# Visit Maintenance

- EVV data in **<u>Incomplete</u>** status will not be used for matching EVV data to the claim
- All six key data elements are required when entering a visit.
  - Any missing data will trigger an exception
- Exceptions appear in the form of a red dot ● when any required element(s) is missing
- Corrections to exceptions can be made either on the 'Visit Maintenance' tab or by clicking on the red dot
- Once all exceptions from a visit are cleared, visit will be updated to 'complete' status
- Agency administrators are responsible for working with their Caregivers to clear any exceptions

| Client Name | Employee Name | Service | Visit Date | Call In | Call Out | Call Hours | Visit Status | Group Visit Code | Units | Actions |
|---|---|---|---|---|---|---|---|---|---|---|
| Quinn, Edward | Adams, April | 5.1 Respite In-Home Hourly | 02/08/2022 | ● | 02:47 PM | | Incomplete | | | ✏ |

# FAQ

# FAQ

**Q: We do not provide care directly; we contract with a care agency. Are we required to register?**

A: Only those Agencies that provide direct care in the beneficiary's home will need to register. Please ensure the Care Agency providing services registers in the CalEVV Portal. Please visit our DHCS EVV webpage for the link to register under the Provider Self-Registration Portal heading.

**Q: What is a Jurisdictional Entity?**

A: Managed Care Plans, Counties, HCBA Waiver Agencies , MSSP Sites, Regional Centers, MCWP Agencies, Counties.

**Q: Do providers using Alternative EVV systems have to register for and take the LMS training?**

A: No, Alternate EVV systems will not be required to take the LMS courses for the CalEVV system.

# FAQ

**Q: Is the process the same for HHCS in 2023 as it was for WPCS?**
A: Yes, HHCS is the next phase, and will focus on registration, training and how to submit EVV data.

**Q:Does this apply to behavioral health (applied behavior analysis) services given to children on the autism spectrum in their homes?**
A: ABA is not subject to EVV. Please refer to our provider types and codes document for services subject to EVV.

**Q: When is the exact date that one should be in compliance and using EVV?**
A: Personal Care Service(s) (PCS) providers must be registered, trained, and currently submitting Electronic Visit Verification (EVV) data as of March 1, 2022.

**Q: Are live-in caregivers subject to the EVV requirement?**
A: No, they are exempt.

# Coming Soon

# Coming Soon

- Aggregator Training is tentatively scheduled for April or early May 2022.

- BI Training sessions 3 & 4 have been delayed.

- Future communication on HHCS implementation .

# CalEVV Resources

# CalEVV Resources

For questions or to be added to the DHCS EVV notification list, email EVV@dhcs.ca.gov.

For information about EVV, please visit the EVV webpage:
https://www.dhcs.ca.gov/provgovpart/Pages/EVV.aspx

For DDS program questions: EVV@dds.ca.gov and the DDS website:
https://www.dds.ca.gov/services/evv/

For CalEVV Technical Support: CACustomerCare@sandata.com or 1-855-943-6070

For Alternate EVV Customer Support: CAAltEVV@sandata.com or 1-855-943-6069

# Questions and Answers

# Public Health Emergency (PHE) Unwinding

- The COVID-19 PHE will end soon and millions of Medi-Cal beneficiaries may lose their coverage.
- Top Goal of DHCS: Minimize beneficiary burden and promote continuity of coverage for our beneficiaries.
- **How you can help:**
  - Become a DHCS Coverage Ambassador
  - Download the Outreach Toolkit on the [DHCS Coverage Ambassador webpage](#)
  - [Join the DHCS Coverage Ambassador mailing list](#) to receive updated toolkits as they become available.

# DHCS PHE Unwind Communications Strategy

- **Phase One: Encourage Beneficiaries to Update Contact Information**
  - **Launch immediately**
  - Multi-channel communication campaign to encourage beneficiaries to update contact information with county offices.
  - Flyers in provider/clinic offices, social media, call scripts, website banners
- **Phase Two: Watch for Renewal Packets in the mail.  Remember to update your contact information!**
  - **Launch 60 days prior to COVID-19 PHE termination.**
  - Remind beneficiaries to watch for renewal packets in the mail and update contact information with county office if they have not done so yet.