Electronic Visit Verification (EVV) Phase II

February 25, 2022

Agenda

- California EVV (CalEVV) Status and Programs Impacted
- About EVV and CalEVV
- What is EVV?
- Why do we need EVV?
- What is the CalEVV Solution?
- Personal Care Services (PCS) Provider Agency Self-Registration Process
- Registration Compliance
- CalEVV Training
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- Coming Soon - Home Health Care Services (HHCS)
- CalEVV Most Common Support Questions and Answers
- FAQ

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CalEVV Status and Programs Impacted

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CalEVV Status and Programs Impacted

- **Effective January 1, 2022, CalEVV went live.**
  - All PCS providers **must** be registered.
    - Includes Waiver Personal Care Services (WPCS).
    - Must use either the CalEVV or Alternate EVV system.

- **Programs impacted by EVV are through the following departments:**
  - Department of Developmental Services (DDS)
  - Department of Social Services (CDSS)
  - Department of Public Health (CDPH)
  - Department of Aging (CDA)
  - Department of Health Care Services (DHCS)

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What is EVV?

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What is EVV?

- EVV is a telephone and computer-based system that records information about services provided.
- The 21st Century Cures Act (Cures Act) requires all states to use an EVV system for Medicaid-funded PCS and HHCS.
- In accordance with the Cures Act, the CalEVV system will collect the:
    - Person receiving the service.
    - Person providing the service.
    - Date of the service.
    - Time the service starts and ends.
    - Location of the service.
    - Type of service.

Why do we need EVV?

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Why do we need EVV?

- It is a federal requirement for all states to use an EVV system.
- The purpose of EVV is to ensure:
  - The correct services are provided at the right location.
  - The services are recorded accurately.
  - Services that are not provided are not submitted for payment.
  - Compliance with the Cures Act.

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What is the CalEVV Solution?

What is the CalEVV Solution?

- The CalEVV system will use a mobile application – Sandata Mobile Connect (SMC) or telephone – to collect visit data.
- An online EVV portal will be used by providers to review and correct EVV data.
- An Alternate EVV system is one that can provide the necessary visit data and connect with the CalEVV system (data aggregator).

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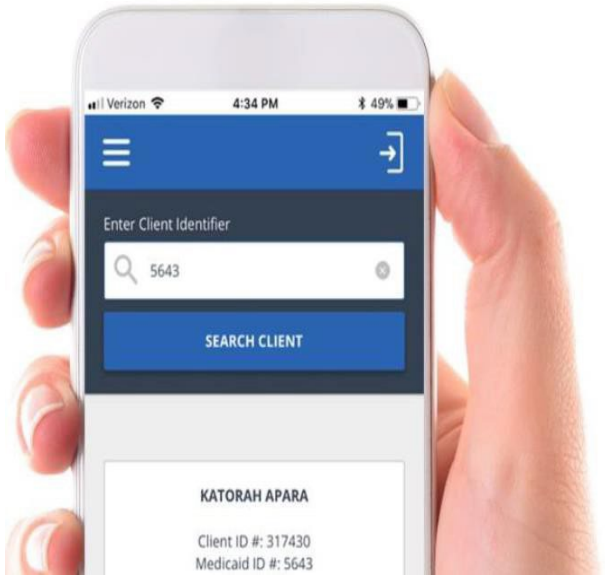
Sandata Mobile Connect



- Works regardless of cell/wifi connection in rural areas (connected or disconnected).
- Bring your own device.
- Application download is available free of charge for iOS and Android.
- Client and services selected from a drop-down list.
- Start and end time verified with GPS to the client's address.
- GPS location captured at check-in and checkout only, and will not continuously track the provider.

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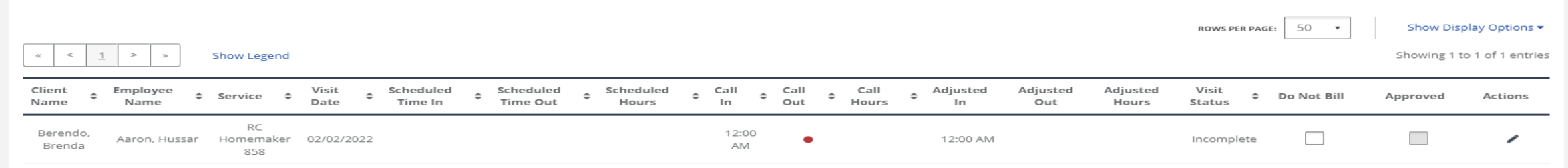
Telephone Visit Verification and EVV Web Portal

Telephone Visit Verification

- Caregiver calls at the beginning and end of each individual visit.
- Caregiver will use the participant's home telephone.
- Caregiver enters their EVV ID, the clients ID, and appropriate service.
- Toll-free numbers will be provided and made available 24/7.

Sandata EVV Web Portal

- Near real-time capture of data.
- Can fix right away exception flags for visits that are missing required data.
- Visit corrections require a reason code and are logged in the history tab.
- Data supports claims submission and reporting.



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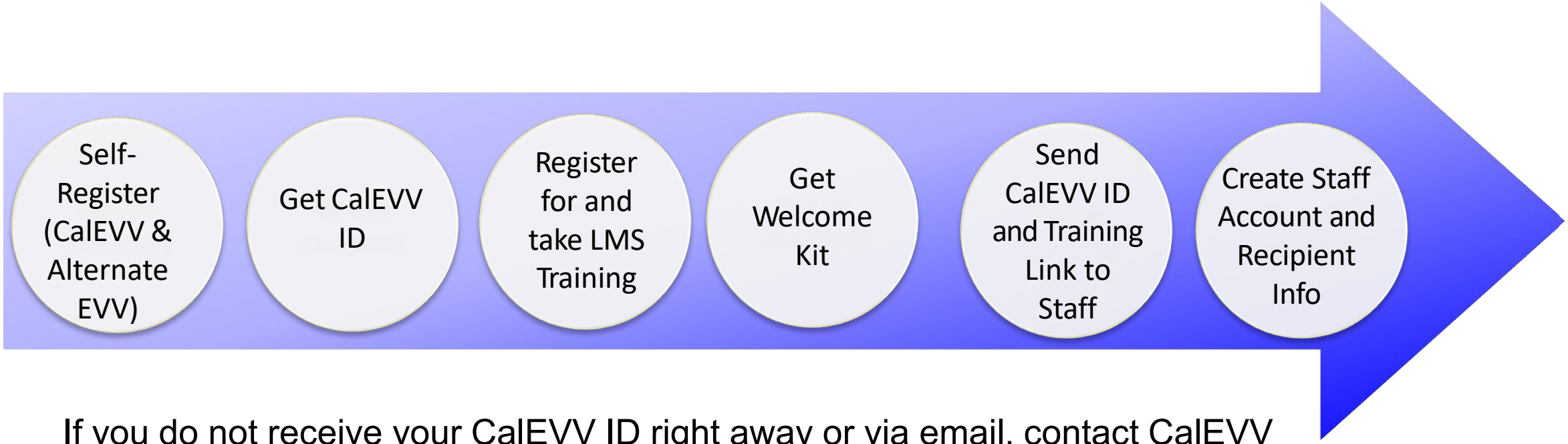
PCS Provider Agency Self-Registration Process

PCS Provider Agency Self-Registration Portal

- Both CalEVV and Alternate EVV system provider agencies must self-register in the portal.
- The provider agency administrator process is outlined below.



If you do not receive your CalEVV ID right away or via email, contact CalEVV Technical Support: CACustomerCare@sandata.com or 1-855-943-6070.

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PCS Provider Agency Self-Registration Portal

Status and Deadlines

- All PCS providers
  - **Must** self-register whether using CalEVV or an Alternate EVV system.
  - **Must** be using either the CalEVV or Alternate EVV system by March 1, 2022.

Registration Compliance

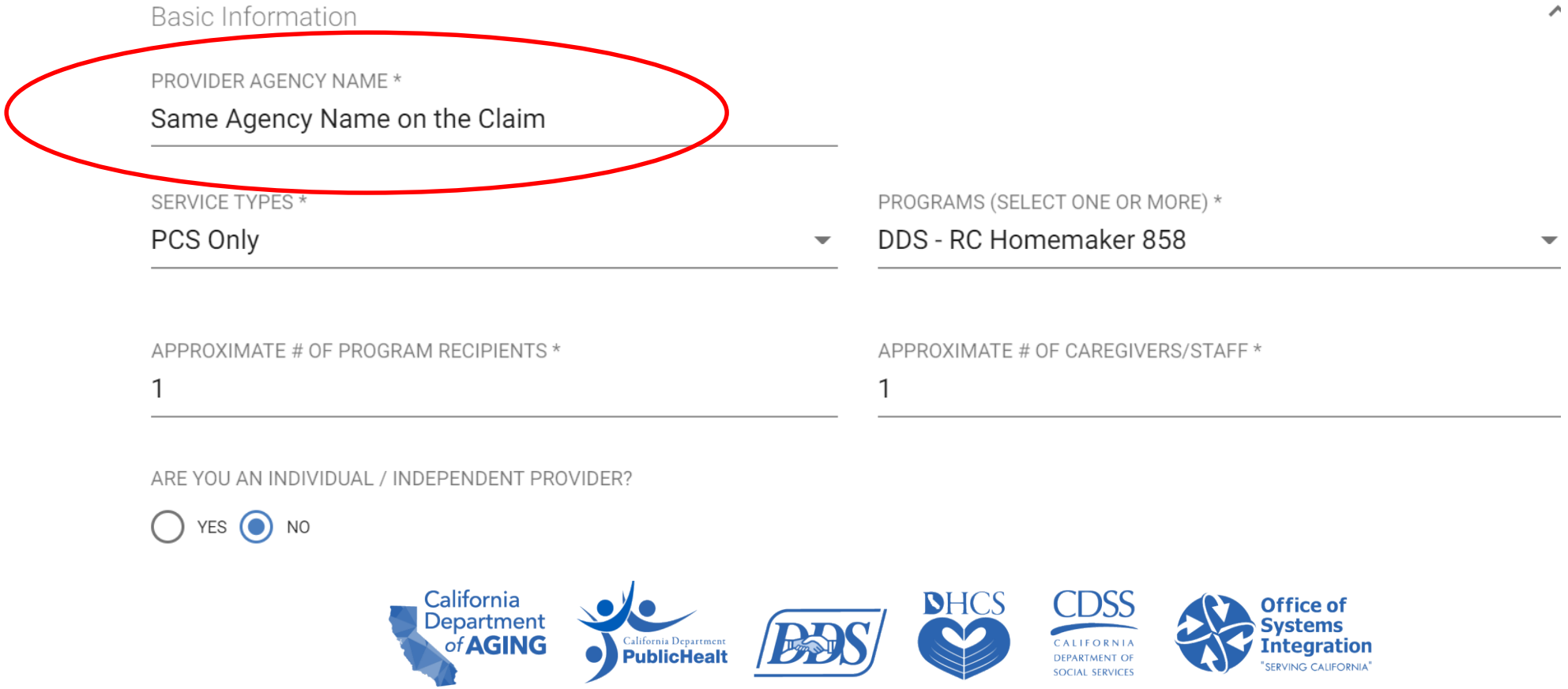
- As of March 1, 2022, providers must be registered, trained, and using an EVV solution.
- If not registered, you will be considered out of compliance with federal and state requirements.
- Enforcement of EVV requirements may involve the following:
  - Monitoring providers for EVV compliance and alerting DHCS of any compliance issues.
  - Offering providers technical assistance and training on EVV compliance.
  - Corrective Action Plan (CAP).
  - Denying approval of Treatment Authorization Request (TAR).

PCS Provider Agency Self-Registration Portal

- Provider agency administrators must register as a PCS provider in the self-registration portal.
- Click on the CalEVV self-registration portal link: https://vendorregistration.calevv.com.
- Once in the portal, provider agencies will specify they are planning to use the CalEVV system or an Alternate EVV system.
- Information on the self-registration portal and the link can be found on the DHCS website: https://www.dhcs.ca.gov/provgovpart/Pages/EVV.aspx.
  - Provider demonstration video: https://www.youtube.com/watch?v=rq4QwzBptl8.

PCS Provider Agency Self-Registration Portal

- PCS provider agency administrators enter the basic information, such as provider agency name, which will be the same agency name as provided on the claim.
- This will be needed to validate claims when reporting to CMS.



PCS Provider Agency Self-Registration Portal

Provider agency administrators, when selecting the **Provider Identifier** – **Identifier Type**, please note the following **rules** for each state program.

- **DHCS, CDPH,** and **CDA** require National Provide Identifier (NPI) **AND** Employer Identification Number (EIN). Providers are required to enter the ID they utilize for billing (for DHCS/CDA/CDPH, that will be the NPI and EIN).
  - This means you will ADD the NPI and SUBMIT, then ADD another Provider Identifier, select EIN, and SUBMIT. The screen should show both the NPI and EIN identifiers (as shown below). below.

Department	Jurisdictional Entity / Jurisdiction	Identifier Type	Identifier	ADD
DHCS via HCBA Waiver Agency	Access TLC	NPI	1111111111	
DHCS via HCBA Waiver Agency	Access TLC	EIN	11-1111111	

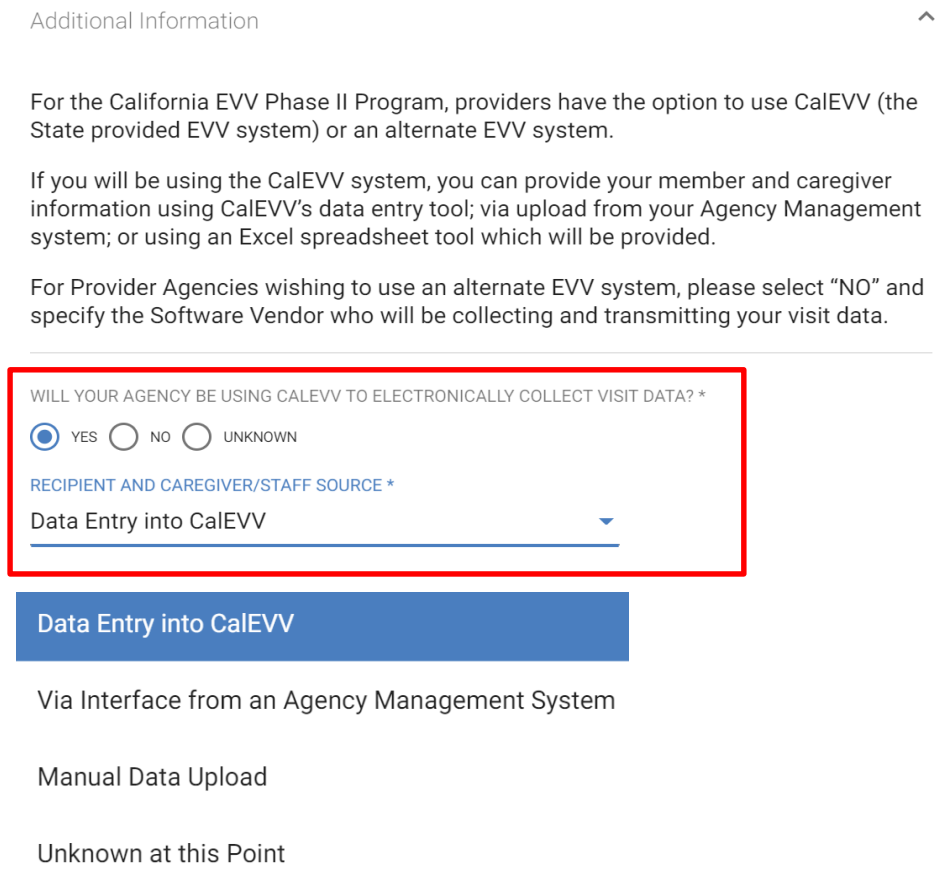
PCS Provider Agency Self-Registration Portal

- When selecting the Provider Identifier, if supporting multiple programs, **more than one** Identifier Type and Identifier is required.
- Enter the Department, Jurisdictional Entity, Identifier Type, and Identifier number and click ADD.
- Repeat the process until you have added all required Identifier Types.

Department	Jurisdictional Entity / Jurisdiction	Identifier Type	Identifier	ADD
DDS via Regional Center	Alta California	DDS Vendor ID	AB1234	
CDA via MSSP Site	City Of Oakland	NPI	1111111111	
CDA via MSSP Site	City Of Oakland	EIN	11-1111111	
DHCS via HCBA Waiver Agency	Access TLC	NPI	1111111111	
DHCS via HCBA Waiver Agency	Access TLC	EIN	11-1111111	

PCS Provider Agency Self-Registration Portal

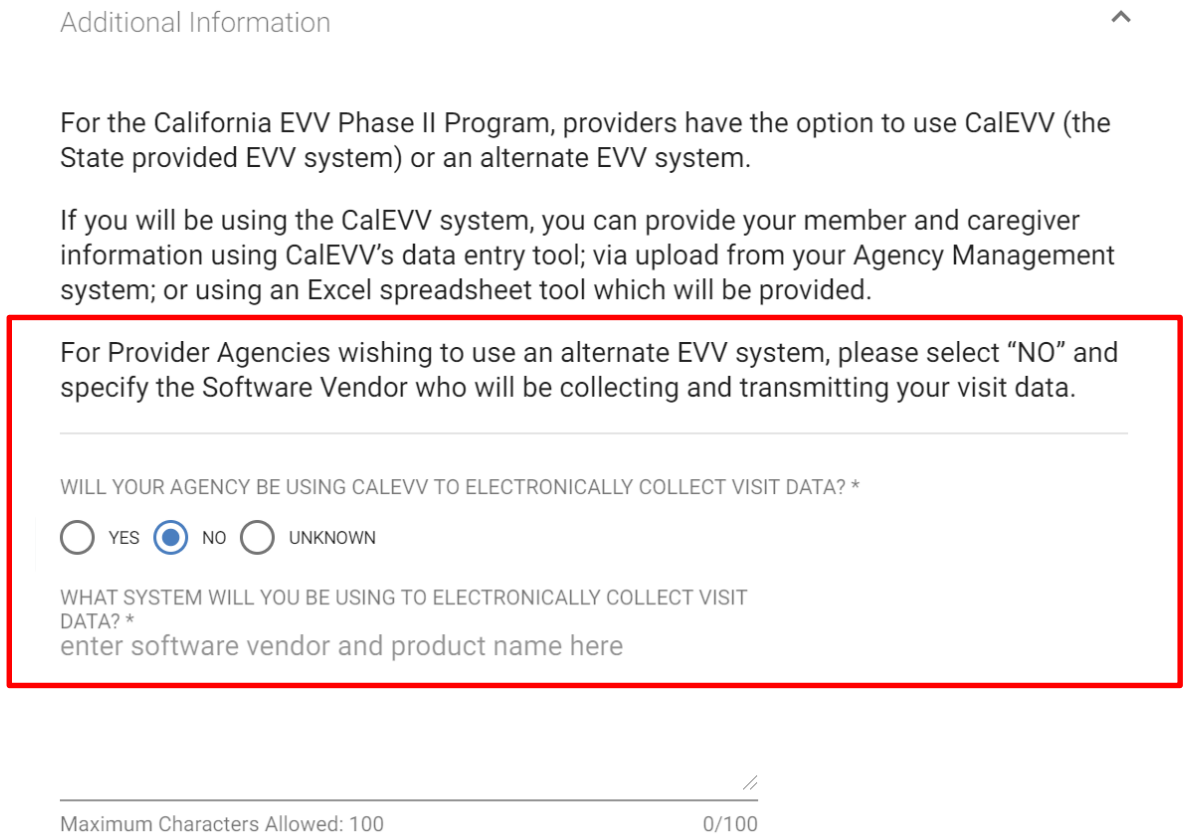
- After you have entered your agency contact information, go to the bottom of the page and complete the Additional Information section.
- This is where you will enter whether you will use CalEVV or Alternate EVV.
- Select “Yes” for CalEVV or “No” for Alternate EVV or “Unknown”.
- When you select “Yes” for CalEVV, the Recipient and Caregiver/Staff Source pull down will appear.
- Select the appropriate method for data entry/upload. Click Submit when done.



PCS Provider Agency Self-Registration Portal

Alternate EVV Self-Registration

- If you have selected “No” for Alternate EVV, you will need to 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.



PCS Provider Agency Self-Registration Portal

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 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.

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PCS Provider Agency Self-Registration Portal

Key Points

- Ensure all the information entered in the self-registration is **accurate and complete.**
- Incorrectly filled out self-registration forms can cause downstream issues with claim and visit validation.

CalEVV Training

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CalEVV System Training Key Points

- Completion of training is **REQUIRED** in order to get credentials.
- Registering for and taking initial administrator training courses (Learning Management System-LMS) is **critical** to get **credentials** to be able to use the CalEVV system.
- Live webinars ended on February 8, however, Sandata on Demand is available and has informational videos.
- Coming in March - Aggregator and Business Intelligence (BI) Training for Jurisdictional Entities ONLY.
  - A communication will be emailed out and posted on the DHCS EVV website with the dates, once confirmed.

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CalEVV System Training and Initial Credentials

- PCS provider agency administrator registers for and takes initial training courses.
  - Provider agency administrators will take the initial mandatory training through LMS.
  - Course includes EVV Overview and Security, which provides the basics on how to manage user setup and security in the EVV portal.
  - Courses located in Sandata's LMS training are self-paced.
- After training is complete:
  - About 24 hours after training is completed, you'll receive an email with directions on how to log into the system, called eTRAC, and download a Welcome Kit.
  - Obtain initial login credentials.
    - Information needed to log visits using the telephony system.
    - Other helpful system information as you get started in CalEVV.

Cal EVV Training - Sandata on Demand

- Provider agency administrator and office staff can take training through self-paced videos online at Sandata on Demand. Links for the following training sessions, videos, and support materials will be included in the administrator training completion email.
    - There are six training sessions available:
        - **Group Visits (How caregivers create group visits)**
        - **Group Visits (For agency users in CalEVV)**
        - **CA EVV Visit Maintenance**
        - **CA EVV Visit Capture**
        - **CA EVV Data Entry**
        - **System Overview**
    - Videos and support materials can be found on Sandata On Demand.

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Alternate EVV System User Registration

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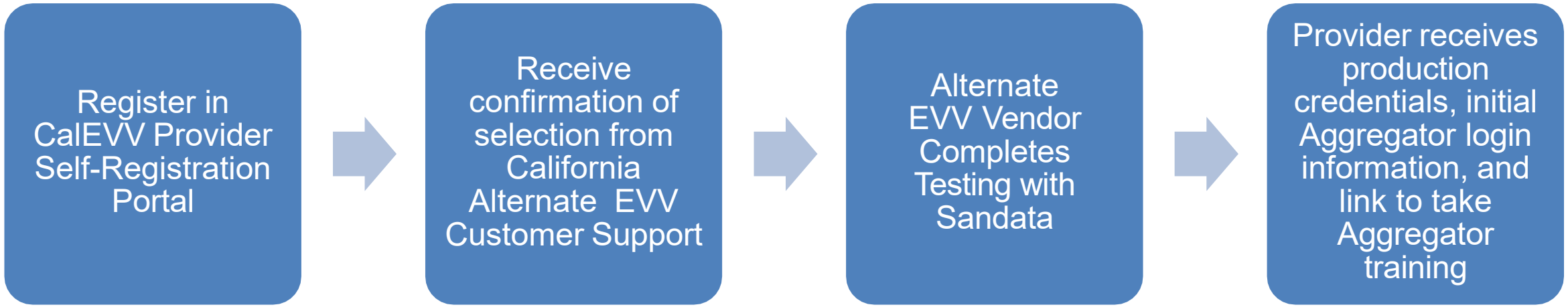
Alternate EVV System User Registration Process

To view a previously recorded Alternate EVV townhall demonstration: https://sandata.zendesk.com/hc/en-us/articles/4412450417171-CalEVV-Vendor-Solutions-Town-Hall-Meeting-.



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Alternate EVV Solution User Registration

- Once registered with CalEVV, and you've selected the Alternate EVV solution, you will receive an email providing instructions for your Alternate EVV vendor and next steps.
- California Alternate EVV Customer Support and your selected Alternate EVV vendor will work together to complete testing to ensure you can successfully send data to the CalEVV Aggregator.
- You will receive another email from the California Alternate EVV Customer Support team when testing has been successfully completed.
- The email will include a link to take self-paced training on the CalEVV Aggregator.

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CalEVV Provider Experience and Support

- When calling or emailing support, have the following information ready:
  - CalEVV ID
  - Santrax ID (if available)
  - Agency name
- During the call, a ticket number will be assigned.
- Resolution will be provided, or the ticket will be escalated for further review and resolution.
- If the provider is communicating questions or concerns with the state/departments, please have their EVV support ticket number and their CalEVV ID ready in order for the state and Sandata to assist them.
- Program questions will be referred to the state/departments for response.

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CalEVV Most Common Support Questions and Answers

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CalEVV Most Common Support Questions and Answers

- **I didn't get my credentials after completing administrator training**
  - Timing between administrator training and credentials email delivery is approximately 24 hours after training completion.
  - The individual who completed the self-registration will be the **only** person to receive a Welcome Kit.
  - **The Welcome Kit cannot be sent/resent to multiple people. Therefore, additional individuals should not call to request one.**
  - If the person who completed the self-registration did not receive the Welcome Kit email in two business days after administrator training is complete, contact Customer Support and provide the Training Certificate.

CalEVV Most Common Support Questions & Answers

- **Selecting the correct program when registering (CalEVV vs Alternate EVV Vendor)**
  - The correct program needs to be selected when registering.
  - If you select CalEVV, you should not be completing the vendor information section; this should only be completed by the Alternate EVV vendor.

FAQ

FAQ

- **Q: How often should data be uploaded when using an Alternate EVV system?**
- A: Daily

- **Q: What are the Jurisdictional Entities?**
- A: Multipurpose Senior Services Program sites, waiver agencies, regional centers, counties, managed care plans

- **Q: What is a Welcome Kit?**
- A: The Welcome Kit is available after a provider agency administrator takes the LMS course. You can download the Welcome Kit after you have taken the initial, self-paced training in the Sandata LMS. The kit contains the initial login credentials that a provider would need to get into the CalEVV system, along with other helpful information.

FAQ

- **Q: Do providers using Alternate EVV have to register for and take LMS training?**
- A: No, Alternate EVV system users will not be required to take the LMS courses for the CalEVV system. After registration is complete, you will receive an email with instructions on next steps.

- **Q: Does EVV apply to applied behavioral analysis (ABA) services given to children on the autism spectrum in their homes?**
- A: No. ABA is not subject to EVV. Please refer to our provider types and codes document for services subject to EVV: https://www.dhcs.ca.gov/Documents/EVV-Provider-Types-and-Codes.pdf.

- **Q: When are we required to start using the CalEVV solution?**
- A: January 1, 2022.

FAQ

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

- **Q: What is a live-in caregiver?**
- A: CalEVV has developed a definition of live-in caregivers for California's Medi-Cal programs subject to EVV, in accordance with federal guidance released on August 8, 2019:

  "A caregiver is considered a 'live-in caregiver' if the caregiver regularly remains in the recipient's home for more than 24 hours at a time, during which they are available to provide any of the authorized personal care services."

FAQ

- **Q: What is an Individual Provider?**
- A: Individual Providers, also known as Individual Nurse Providers, are defined as:
  - A Medi-Cal enrolled in-home provider who provides HHCS and can submit claims to the Medi-Cal Fiscal Intermediary or Medi-Cal managed care plans.
  - Individual Nurse Providers are:
    - Either a Registered Nurse or Licensed Vocational Nurse.
    - May or may not work through an agency.
    - Can be employed by a nursing registry or hired by the recipient.
    - Sometimes used for California Children's Services (CCS) or waiver programs.

Coming Soon

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Coming Soon

- HHCS
  - Implementation is anticipated by January 1, 2023.
  - All HHCS providers will be required to send EVV data by January 1, 2023.
  - Outreach and communication activities will begin within the next couple of months.

- CalEVV Aggregator training sessions will be held in **March** and are for Jurisdictional Entities ONLY. Communication will be sent out once dates are finalized.
  - CalEVV Aggregator: The state's portal where data from all EVV solutions (the CalEVV solution and Alternate EVV solutions) is gathered.

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

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