



CaEVV Aggregator User Guide for Jurisdictional Entities

Sandata

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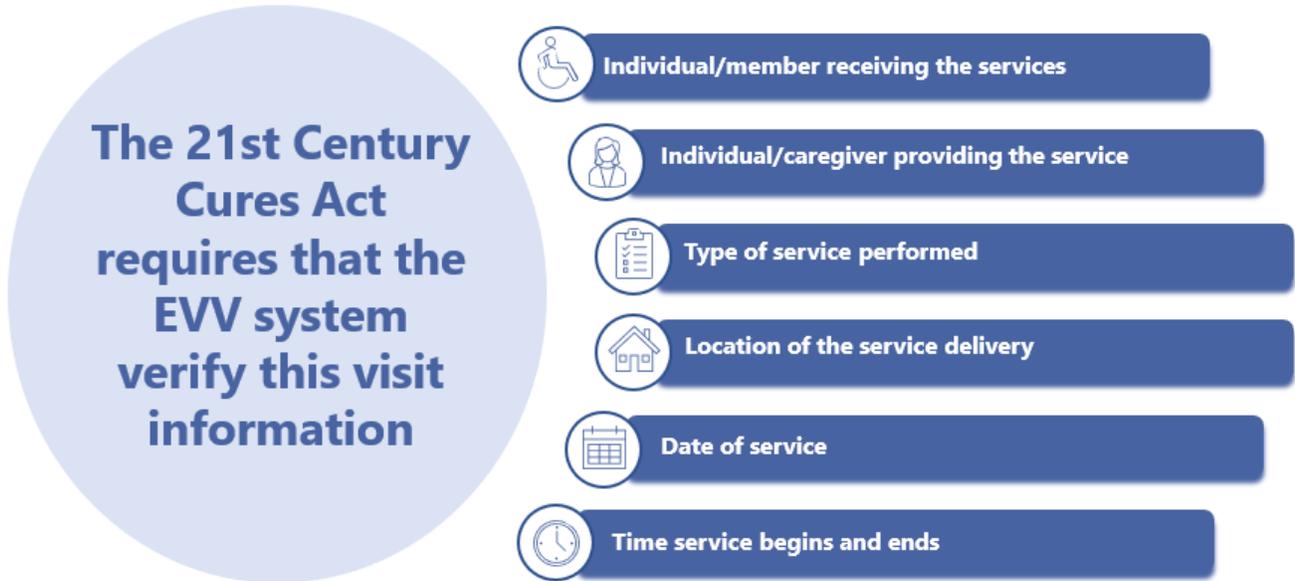
Jurisdictional Entities (JE)

Local organizations that pay and/or authorize providers for services and provide oversight of service delivery. They include:

- Home and Community-Based Alternatives (HCBA) Waiver Agencies
- Managed Care Plans (MCP)
- California Children’s Services (CCS) Counties
- Department of Health Care Services (DHCS)
- Regional Centers (RCs)
- Multipurpose Senior Services Program (MSSP) Sites
- Medi-Cal Waiver Program (MCWP) Agencies
- County In-Home Supportive Services (IHSS)

EVV Overview - Federal Mandate Requirements

The 21st Century Cures Act, enacted in 2016, mandates all states to use an EVV system for Medicaid-provided* personal care services (PCS) and home health care services (HHCS) requiring an in-home visit by a provider.



*For the Department of Developmental Services (DDS), providers of regional centers are required to provide services that are federally eligible as a part of their vendorization. Also, in the Self-Determination Program (SDP), participants who choose to be in the SDP agree that the services they receive are eligible for federal financial participation.



Provider Compliance

Compliance means providers are registered and submitting complete EVV visit data for services provided in the home.

- Live-in caregivers are exempt from EVV requirements (see department websites for more details).
- EVV visit data must be captured in the CalEVV system, or an alternate EVV system, at the time of the visit.
- Manual entry or editing of a visit should only be done to ensure a compliant visit is recorded.
- EVV will not change where or how services are being provided.
- Providers will continue with existing authorizations or billing processes.

JEs to disseminate state department communications to impacted providers to ensure providers are receiving communications and are aware of EVV requirements and timelines.

Requesting Aggregator Access

If Aggregator access is needed, or if Aggregator access should be removed, please follow the instructions below, according to your state agency.

DHCS: JE and their identified representatives listed below are to email EVV@dhcs.ca.gov for the Aggregator/Business Intelligence (BI) Tool request form.

- Counties – CCS Administrator or Medical Director to submit form
- MCP – Primary and/or secondary contact to submit form
- HCBA Waiver Agency – Waiver Agency Administrator to submit form

DDS: RC staff can email EVV@dds.ca.gov copying the authorizing RC Executive.

California Department of Public Health: Email Drew.Young@cdph.ca.gov to request for the Aggregator/BI Tool Request form.

California Department of Aging: Email CACustomerCare@Sandata.com to request Aggregator/BI Tool access.



CalEVV Aggregator Overview

Aggregator integrates visit data from CalEVV and Alternate EVV systems into one central location. It is a repository containing the electronic visit data submitted by providers allowing the JE user to see visit data associated to their jurisdiction.

- Includes providers, employees, clients, visits, and matched claims.
- The data comes into Aggregator in near real-time.
- Aggregator is a read-only portal, no one can edit visit data in Aggregator, not even the providers.

A Call or Visit is a service provided during an in-person encounter to a client in a home or community-based setting. The maximum length of a visit in the CalEVV system is 25 hours (24 hours with an extra hour to account for early or late calls).

The JE staff members who will access the Aggregator can:

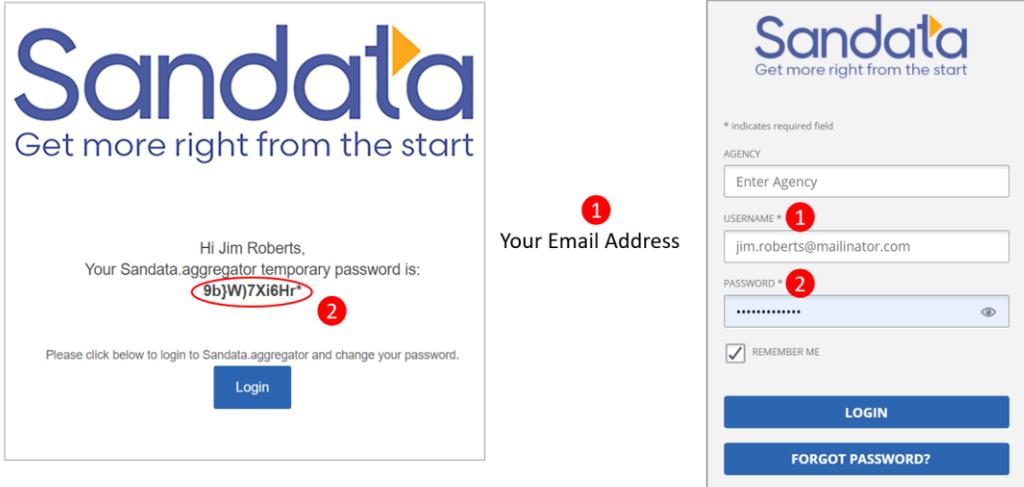
- Verify compliance by reviewing the registration status and visits submitted to the state by their providers.
- Run several reports, allowing users to quickly check certain segments of data. Reports can be scheduled to run at a future time.

In Aggregator the JE user can:

- View and access all required EVV data submissions.
- Search, sort, and generate reports for EVV visit information.
- Review EVV data submitted by providers via CalEVV, or an alternate EVV system, to verify compliance.
- Verify the visit status, (e.g., Incomplete, Verified, etc.).

First Time User Login

When an Aggregator account has been created, the user will receive a password email. Check the inbox as well as the junk/spam folder.



Your Email Address

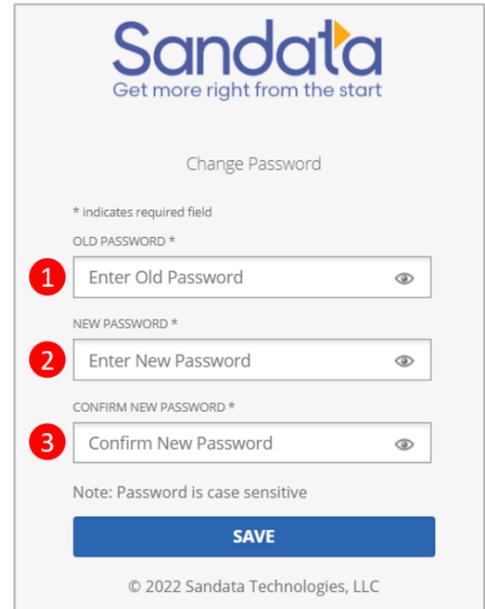
- Click the Login button to open the Aggregator login screen from the password email. Access Aggregator on one of the three supported browsers: Google Chrome, Microsoft Edge, and Mozilla Firefox.
- On the Login Screen, leave the Agency field empty.
 1. Enter the email address that was used when the JE Admin Aggregator account was created into the Username field
 2. Enter the temporary password into Password field

After 5 failed login attempts the user is locked out of Aggregator. Use the Forgot Password button beforehand to avoid being locked out. Passwords can be reset once every 24 hours.

Change Password

Following initial login users are required to change the password.

1. **Old Password:** Enter the temporary password from the welcome email.
2. **New Password:** Create a new password. Minimum password requirements:
 - 12 characters
 - 1 UPPERCASE letter
 - 1 lowercase letter
 - 1 number
 - 1 special character
3. **Confirm New Password:** Reenter new password.



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Get more right from the start

Change Password

* indicates required field

OLD PASSWORD *

1 Enter Old Password

NEW PASSWORD *

2 Enter New Password

CONFIRM NEW PASSWORD *

3 Confirm New Password

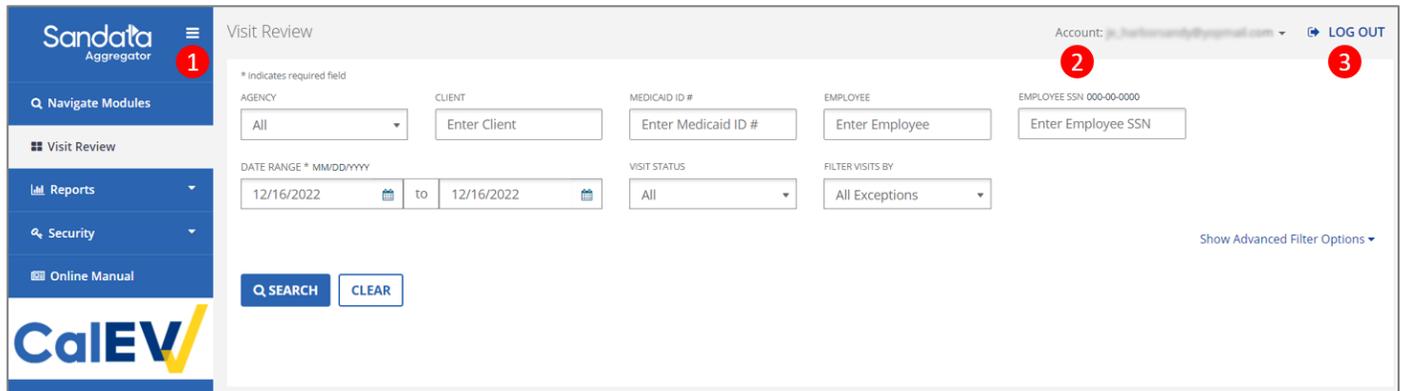
Note: Password is case sensitive

SAVE

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CalEVV Aggregator Header

The system header and menu will always be present on the screen.



Sandata
Aggregator

Visit Review

Account: jbarbosa@yopmail.com **LOG OUT**

* indicates required field

AGENCY: All | CLIENT: Enter Client | MEDICAID ID #: Enter Medicaid ID # | EMPLOYEE: Enter Employee | EMPLOYEE SSN: Enter Employee SSN

DATE RANGE: 12/16/2022 to 12/16/2022 | VISIT STATUS: All | FILTER VISITS BY: All Exceptions

SEARCH **CLEAR**

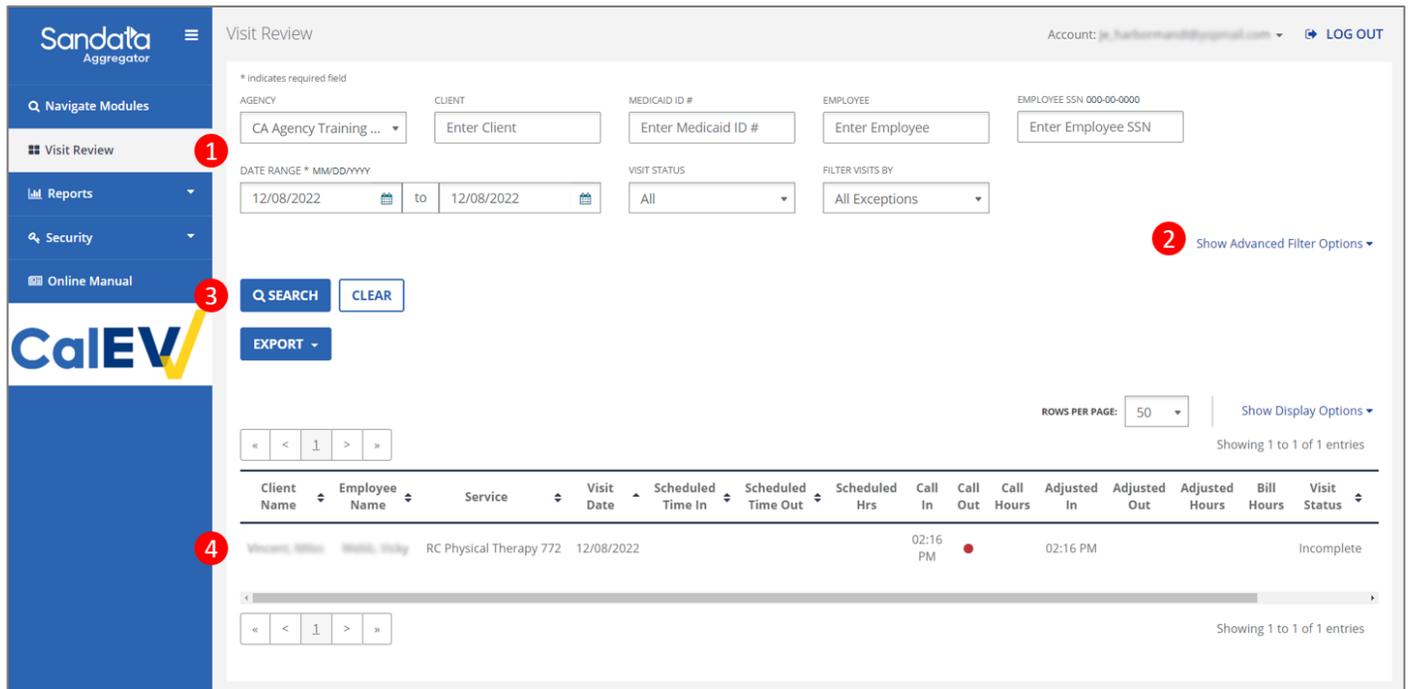
Show Advanced Filter Options

1. **Menu Button:** Clicking collapses/expands the menu.
2. **Account:** Displays the user email address.
3. **Log Out Button:** Click when finished working in the system.
 - After five minutes of inactivity a pop-up box appears asking the user if they would like to continue working.
 - If the user does not respond to the pop-up, the system automatically logs out after five minutes.

Visit Review - Verify Registered Providers and Cures Compliant EVV Data

The Visit Review module displays visit records of provider agencies from both CalEVV and Alternate EVV systems who have entered their Provider Identifiers associating/linking themselves to the appropriate JEs.

- Use this module to verify providers are registered and to verify that Cures Compliant EVV data is being submitted.
 - During self-registration, providers enter their provider identifiers associating/linking themselves to their JEs.



The screenshot shows the Sandata Visit Review interface. On the left is a navigation sidebar with 'Visit Review' highlighted. The main area contains search filters for Agency, Client, Medicaid ID, Employee, and Employee SSN. It also includes date range and visit status filters. A search bar with 'SEARCH' and 'CLEAR' buttons is present, along with an 'EXPORT' button. A table displays a single visit record for 'RC Physical Therapy 772' on '12/08/2022'. The table columns include Client Name, Employee Name, Service, Visit Date, Scheduled Time In/Out, Scheduled Hrs, Call In/Out, Call Hours, Adjusted In/Out, Adjusted Hours, Bill Hours, and Visit Status. The status is 'Incomplete'. Red callouts 1-4 point to the 'Visit Review' menu item, the search bar, the 'Show Advanced Filter Options' link, and the table header respectively.

1. Searching for Visits

Use the visit review screen and steps below to search for visits. The filters on this screen allow users to limit the search results to include only visits matching the search criteria.

Agency field: This drop-down field displays provider agencies or providers that are registered and associated/linked to the JE.

- Use this field for a visual verification that providers are registered.
 - If a provider is not listed in this field, then contact the provider to have them enter their provider identifiers.
 - Providers using CalEVV will update provider identifiers in the Security > Manage Provider Identifier module.
 - Providers using an alternate EVV system will update provider identifiers in the Security > Manage Provider Identifier module in CalEVV Aggregator.

- The number following the provider agency’s name is the provider’s CalEVV account number.

- This field allows the user to select one provider agency or view records from all provider agencies.
 - If all provider agencies are selected, then at least one other search parameter must be selected.

* indicates required field

AGENCY: CA Agency Training ...

CLIENT: Enter Client

MEDICAID ID #: Enter Medicaid ID #

EMPLOYEE: Enter Employee

EMPLOYEE SSN 000-00-0000: Enter Employee SSN

08/2022

VISIT STATUS: All

FILTER VISITS BY: All Visits

Agency dropdown menu items:

- All
- CA Agency Training Acct 11 - 165035
- CA Agency Training Acct 3 - 165039
- CA Agency Training Acct 4 - 165038
- CA Agency Training Acct 7 - 165037
- CA Agency Training Acct 8 - 165036
- CA Agency Training Acct 9 - 165032
- CA EVV Agency Two - 165023
- Rock 2U Inc - 165044

Note: Use the Agency field for a visual verification that providers are registered.



Client field: This field is searchable by last name, first name.

- The Client is an individual who receives services subject to EVV requirements.
- In California, clients are also known as beneficiaries, consumers, members, participants, and recipients.

Medicaid ID field: This field is used to search for one client across all agencies by entering the Client Identification Number (CIN) or Unique Client Identifier (UCI).

- DHCS, California Department of Aging (CDA), California Department of Public Health (CDPH), and California Department of Social Services will enter the CIN which is 8 digits plus 1 alpha capitalized.
- DDS will enter the UCI which is 7 digits.

Employee field: This field is searchable by last name, first name.

- An Employee is an individual who is providing the service to the client.
- In California, employees are also known as caregivers, in-home providers, and staff.

Employee Social Security Number (SSN) field: This field is not active in CaIEVV.

Date Range field: Select the date range to be searched. This is a required field.

- The default date is the current date.

Visit Status field: This is a drop-down field used to limit the result by visit status.

- **Incomplete:** A visit that has exceeded 24 hours and is still missing one of the six required data elements. Incomplete status means the visit is not Cures compliant.
- **Omit:** A visit that has been marked “Do Not Bill” will have an Omit status. A provider marks “Do Not Bill” on a visit record in the instance of a duplicate visit record or for a scheduled visit that did not occur.
- **Processed:** This means the provider had a federal claim that matched to the EVV visit record.
- **Scheduled:** This means the visit has been scheduled for a future time.
- **Verified:** A visit that does not have a missing data element, the visit is complete. The goal for the providers is to have all their visits in a verified status. Verified status means the visit is Cures compliant.

Filter Visits By field: This field is used to limit the results by:

- **All Exceptions:** This will display all visit records with missing information.
- **All Visits:** This will display visits with missing data elements as well as verified visits.
- **Exception Types:** Use this field to limit the results to visits with the selected exception/s.



2. Advanced Filter Options

Displays more filters to continue to narrow a search including the ability to save or reset filter selections.

Client ID: A client identifier is generated by each CalEVV system when a client is added to that system, it is unique to each client-agency pairing.

Employee ID: An Employee is unique to an employee/agency pairing.

Payer: This field lists the payer.

Program: Use this field to limit results by the selected program.

Service: Use this field to limit results by the selected service. Providers enter authorized services into client records which is the second part of mapping the client and service to the JE.

Call Type: Use this field to limit results to visits with the selected call type.

- **MVV:** This filters for visits that were logged with the mobile application.
- **Manual:** This filters for visits that were logged by manual entry in the CalEVV Portal.

Supervisor: This is not an active field in CalEVV.

Group Visit Code: A group visit is when one or more caregivers provide the same service to clients at the same time and place.

3. Buttons

These are the available action buttons in Visit Review.

Save Settings button: This button saves selected search filters. Any fields requiring a text entry are not saved.

Reset button: This button clears saved filter settings.

Search button: This button activates the service criteria.

Clear button: This button removes the information entered in the search fields.

Export button: This button appears after a search has been completed.

- This enables exporting the results into a CSV or Excel format.
- The search results disappear when users click away from the search results.



4. Visit Results List

Each row is a visit record.

Page Navigation: Displays the current page vs. the total number of pages of search results.

Rows per Page: Use this drop-down to select the number of records displayed on each page of the results.

Results Summary: Displays a summary of the number of records available in the results list.

Show Display Options: Use this to add/remove columns to/from the results list.

Column Headings: Use the up/down arrow to sort the search results in ascending or descending order based on the column selected.

Actions Column: Has an Eye button indicating read-only information.

- Click the Eye Button to view the Visit Details.

Visit Exception: This is an indicator of incorrect or missing information on the visit record that needs to be addressed by the provider. A visit exception is represented by a red colored dot.

- If a visit has the status of Incomplete, then the visit is not Cures compliant.
- If a visit has the status of Verified, then the visit is Cures compliant.

ROWS PER PAGE: 50												Show Display Options ▾
Showing 1 to 3 of 3 entries												
Client Name	Employee Name	Service	Visit Date	Scheduled Time In	Scheduled Time Out	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Visit Status	Actions
Vincent, Miles	Wells, Vicky	RC Physical Therapy 772	12/08/2022			02:16 PM	●		02:16 PM		Incomplete	👁
Living, Lisa	Wells, Vicky	RC Personal Assistance 062	12/08/2022			02:09 PM	02:10 PM	00:01	02:09 PM	02:10 PM	Verified	👁
Bank, Ashley	Wells, Vicky	RC Home Health Aide 856	12/08/2022	02:00 PM	11:59 PM	02:05 PM	02:07 PM	00:02	02:05 PM	02:07 PM	Verified	👁

Each department will see similar line items but with service descriptions that pertain to them. Above is an example of **DDS**. Note this is only a sample of the services that can be selected.

DHCS users will see:

- Managed Care Plan: MCP – Newborn Care, etc.
- Managed Care Plan – Community Supports: MCP – CS Homemaker Services 15 min, etc.
- California Children’s Services: CCS – HHA home health aide, ea 15 min, etc.
- Home and Community Based Alternatives: HCBA Respite Care in the Home, etc.

CDPH users will see: MCWP Homemaker Services, etc.

CDA users will see:

- Managed Care Plan: MCP – S5136-CBAS-ERS PCS in the home; per diem etc.
- Multipurpose Senior Services Program: MSSP – 3.2 Personal Care Day, etc.

Reports - Verify Cures Compliant EVV Data

This module allows users to run reports to view data now or later.

- Use the reports in this module to verify Cures Compliant EVV data.

Reports

1. Navigate to the Reports module. Use the drop-down and click on **Reports**.
2. Select the applicable fields in the **Select Report** section.
 - a. Select the **Corporation**.
 - b. Then Select the **Report Type**. For full report descriptions refer to the Report Types section of this guide.
 - Billing – Is used to view billing data.
 - Daily Reports – Is used to view data for one selected day.
 - Date Range Reports – Is used to view data for a selected timeframe.
 - c. Then select the **Report Name**.

3. Select the applicable fields in the **Timeframe** section.
4. Select the applicable fields in the **Select Parameters** sections.
5. Click **Run Report** or **Schedule Report**. Schedule Report allows the user to schedule a report to run at a future time.
 - Use the **Clear** button to remove the information entered in the fields.

Preview a Report

After a report has been run, the report can be viewed in Aggregator.

For an accessible version of this report, click "Export to Excel" to open report in Excel. **EXPORT TO EXCEL** (1)

Page 1 of 1 (2) Find | Next (4) Refresh (5)

Visits Claims Verification Status

Report Parameters
 Account: CA Agency Training Acct 11 (10/10/2022)
 For: 12/8/2022 - 12/8/2022 11:59:59 PM
 Corporation: (Select Regional Center) - 375
 Visit Status: All

Payer	Program	Service	HCPCS	Client Name	Client Medicaid ID	Visit			Group Visit Code	Status	Batch ID	Transaction ID	Visit Verified Date
						Date	Start	End					
CADD5	HHCS	RC Home Health Aide 856	Z9026	Becky, Audrey	146022008	12/08/2022	02:05 PM	02:07 PM		Verified			
CADD5	PCS	RC Personal Assistance 062	Z9111	Henry, Lyle	146022008	12/08/2022	02:09 PM	02:10 PM		Verified			
CADD5	HHCS	RC Physical Therapy 772	Z9010	Shawntel, Shelia	146022008	12/08/2022	02:16 PM			Incomplete			
Sub Total # of Visits: 3													
Total # of Visits: 3													

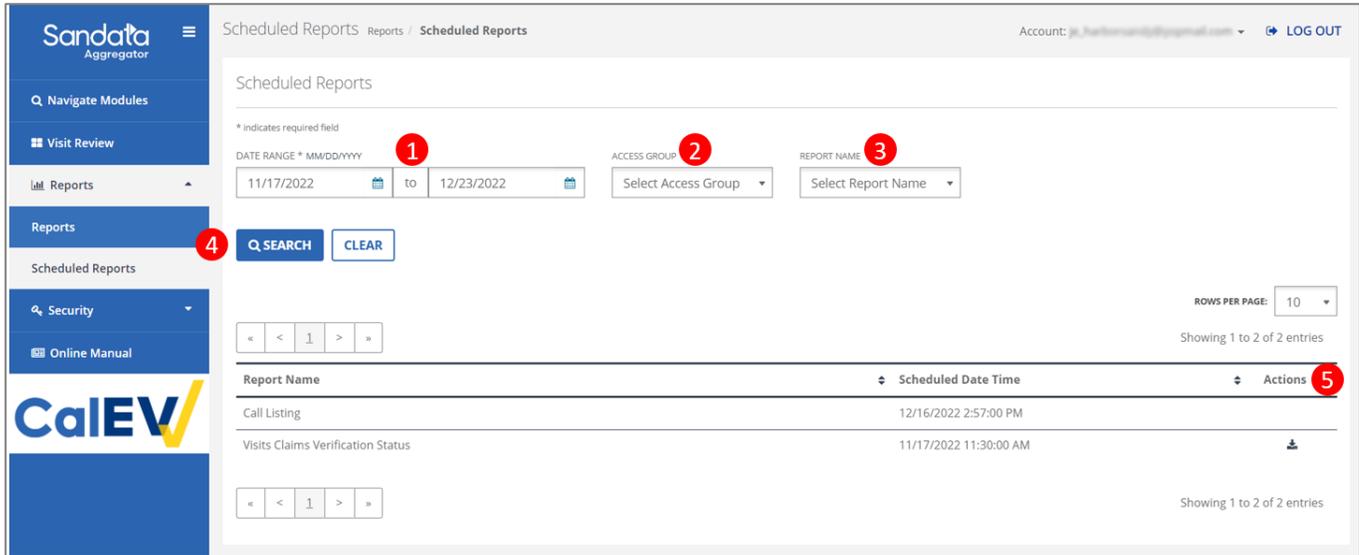
1. **Export to Excel button:** For accessibility, an Export to Excel button allows users to create an Excel spreadsheet of the report.
2. **Page Navigation:** Displays the current page vs. the total number of pages of the report.
3. **Search:** Enter the term you would like to search for in the window and click find to locate the term.
 - Click next to find more occurrences of the searched term.
4. **Export Drop-down menu button:** Use this button to export the report into various formats including PDF, CSV, and Word.
5. **Refresh button:** Click this button to refresh the data
6. **Example of a Report with Cures compliant data.** This report is an example of how to use reports to verify Cures compliant EVV data.
 - If a visit has the status of Incomplete, then the visit is not Cures compliant.
 - If a visit has the status of Verified, then the visit is Cures compliant.

See report descriptions in the Report Types section of this guide.

Scheduled Report

The Scheduled Reports module is where users can download reports that were previously scheduled to be run.

- Users will receive an email indicating the report is ready for download in the Schedule Reports module.
- Reports will be available for download for 60 days.



Sandata Aggregator

Scheduled Reports Reports / Scheduled Reports Account: jk_hartmann@sandata.com LOG OUT

Scheduled Reports

* Indicates required field

DATE RANGE * MM/DD/YYYY **1** 11/17/2022 to 12/23/2022 ACCESS GROUP **2** Select Access Group REPORT NAME **3** Select Report Name

4 Q SEARCH CLEAR

ROWS PER PAGE: 10 Showing 1 to 2 of 2 entries

Report Name	Scheduled Date Time	Actions 5
Call Listing	12/16/2022 2:57:00 PM	
Visits Claims Verification Status	11/17/2022 11:30:00 AM	

Showing 1 to 2 of 2 entries

1. **Date Range:** Select the applicable date range.
2. **Access Group** (optional): Select the applicable access group.
3. **Report Name** (optional): Select the applicable report name.
4. **Search Button:** Click search to see the results.
5. **Actions Column:** Click the download button to download and save the report.



Report Types

The Report types are divided into three groups, allowing users to easily locate a specific report. The groups include: Billing Reports, Daily Reports, and Date Range Reports.

Billing Reports

Visits Claims Verification Status: This report displays all visits within the selected date range and shows the last time each visit was returned to the payer for validation.

- Use this report to track the status of visits relative to claims validation. It can be used to review when a particular visit was returned to the adjudicating system.

Daily Reports

Active Clients: This report lists all active clients and information from the client's profile including the Santrax ID, name, phone number, city, and zip.

- This report provides an overview of all active clients.

Call Listing: This report displays all calls that were made to Santrax EVV phone numbers for the date and time range that was specified when selecting the report. The calls are listed one after another individually with the beginning pages listing the unknown calls.

- This report is used to review calls.

Call Summary: This report pairs the Start and End calls together and calculates the hours worked.

- This report is to review current visit information on a daily basis and identify the incomplete visits from the previous day that need follow-up.

Global Positioning System (GPS) Distance Exception: This report displays calls entered by a mobile user from a GPS location that is further from any of the client's GPS-validated addresses than the configured distance threshold.

- Use this report to identify calls that were not made from an expected location. The report also indicates the distance the call was made from the client's closest address.

Visit Listing: This report displays all actual calls for all visits across all agencies for the selected day. It allows the user to see all activity for a specific day across agencies, allowing users to perform further analytics on activity.

- Use this report to view all visits for the selected day and review the visit status and call in/out times in one report.

Visit Verification: This report provides information for visits on a given date. Reported information for each visit includes all call information.

- Use this report to see all information about a visit including additional information that is not visible directly on the visit line in Visit Review, such as extraneous calls. This report can be used as a convenient way to report and/or verify visit maintenance information.



Date Range Reports

Client Visit Summary: This report shows all visits for the selected date range sorted by client, with one client per page, for the selected date range. The report provides visit hour sub-totals by date and client as well as basic visit information which includes the visit date, employee's Santrax ID, employee's name, number of visits, visit start and end time, and visit hours.

- Use this report to review visit hours and information by client.

Detail Visit Status: This report is a detailed view of all visits based on the selected date range and parameters. The report groups the client and employee information pertaining to the visit with the visit details such as exceptions, services, date, time, and the actual/adjusted call-in and call-out times.

- Use this report to review a detailed overview of all visits within a selected date range.

Summary Visit Status: This report is a summary view of the status of all visits based on the selected date range and parameters. The results are sorted by the duration of time each visit has remained in the same status.

- Use this report to review the status of all visits within a selected date range.

Visit Log: All visits associated with each client within the selected date range are listed with one client per page in this report.

- Use this report to track your client's visits by monitoring call times, pay, and reason codes.

Visit Verification Activity Summary: This report contains a list of modifications for each visit, if any. Only the modified visits are included in this report and the report is sorted by the user who performed the Visit Maintenance.

- Use this report to review Visit Verification.

Security

This module allows users to change their password.

- Aggregator requires passwords to be changed every 60 days.
- If a user password expires, please contact customer care.



CalEVV Helpful Resources

The following resources are available for EVV and technical support.

DHCS EVV webpage: <https://www.dhcs.ca.gov/provgovpart/Pages/EVV.aspx>

DDS EVV webpage: <https://www.dds.ca.gov/services/evv/>

Aggregator training video:

- [CalEVV State Led Training Webinar \(YouTube\)](#)
- [Additional Aggregator videos](#)
 - Must be registered and logged in.

For CalEVV Technical Support:

- Email CACustomerCare@sandata.com
- Phone: 1 (855) 943-6070