CalEVV User Guide for Alternate EVV Providers

Sandata

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About

This user guide is to help providers who use an Alternate Electronic Visit Verification (AltEVV) system, and the vendors of those systems, understand how to be compliant with the Federal Electronic Visit Verification (EVV) mandates.

Federal Mandate Requirements

The 21st Century Cures Act, enacted in 2016, requires states to use an EVV system for Medicaid-provided Personal Care Services (PCS) and Home Health Care services (HHCS).

The EVV system needs to electronically capture all six (6) data elements for every PCS and/or HHCS service provided in the home:

- Client/member receiving the services
- Individual/caregiver providing the services
- Type of service performed
- Location of the service delivery
- Date of service
- Time service begins and ends

Provider Responsibility

Providers are responsible for registering and submitting complete Cures compliant EVV visit data for services that are provided in the home. A Cures compliant EVV visit record must contain the six (6) data elements identified above.

Please review the [Provider Types and Codes document](#) to confirm if the services you provide require EVV. For a list of exemptions, please contact your state department.

For state department contacts, please e-mail:

- o   Department of Health Care Services (DHCS) at EVV@dhcs.ca.gov
- o   Department of Developmental Services (DDS) at EVV@dds.ca.gov
- o   California Department of Aging (CDA) at EVV@aging.ca.gov
- o   California Department of Public Health (CDPH) at CDPHMCWP@cdph.ca.gov
- o   California Department of Social Services (CDSS) at EVV@dss.ca.gov

For AltEVV assistance, please call your Sandata customer support team at (855) 943-6069 or e-mail at CAAltEVV@sandata.com.

All providers should monitor visit data for correctness and maintain provider billing identifier (NPI, DDS Vendor ID, etc.) within their CalEVV Aggregator. For more information on how to update or maintain provider billing identifiers, please review the [Quick Reference Guide for Adding and Managing Provider Identifier(s)](#).

Providers using AltEVV systems are responsible for ensuring their AltEVV vendors send client, employee, and EVV visit data to the CalEVV Aggregator and that the EVV data captured in their AltEVV system is correct.

AltEVV

The State of California provides a free EVV solution, the CalEVV portal. Providers may choose to use an alternate third-party software system to collect the six (6) data elements required for EVV.

These alternate systems are referred to as AltEVV systems. If a provider chooses to use an AltEVV system, the provider **still must** self-register with CalEVV. If you need to self-register, please use this link: Provider Self-Registration Portal. For help, review the Self-Registration Portal Guide.

What is a Jurisdictional Entity (JE)?

Jurisdictional Entities (JEs) are local organizations that authorize services and provide oversight of service delivery. When self-registering with CalEVV, you must select one (1) or more JEs with which to affiliate. In order to avoid potential data integrity issues, **please ensure that you are selecting the correct JE(s)**.

AltEVV Providers and their Vendor Systems

Once you have self-registered with CalEVV, it is important to ensure that your AltEVV system is compatible with the CalEVV Aggregator. To do this, the AltEVV Vendor must contact the CalEVV software vendor, Sandata, to complete their system certification at CAAltEVV@sandata.com.

If your vendor has any questions about completing the vendor checklist, please direct them to the following resources online: Alt EVV Vendor Resources.

New AltEVV Provider Credentials

Each new provider agency must complete the pre-recorded CalEVV Aggregator training. Sandata provides the new AltEVV Vendor production credentials to share with their provider once the vendor of choice meets testing and certification process is approved.

Here are the steps to obtain your CalEVV Aggregator credentials:

1. AltEVV Provider registers and advises of selected vendor
2. AltEVV Provider and vendor are acknowledged and advised of Next Steps: Training (provider) Testing (Vendor)
3. AltEVV Vendor registers in the Vendor Self-Registration Portal and links to the AltEVV Provider they are associated with.
4. AltEVV Vendor completes testing in vendor portal
5. Once validated AltEVV Vendor generates the Welcome Letter to AltEVV Provider via the vendor portal

CalEVV Aggregator

The CalEVV Aggregator integrates visit data from the CalEVV portal and AltEVV systems into one central location and includes information on the following:

- Providers, employees, clients, and visits.
- Data that is submitted in near real-time based on AltEVV Vendor submissions.
- A read-only database: visit information in Aggregator is **not** editable.

Login here to access the [CalEVV Aggregator](#).

Any correction to data in the CalEVV Aggregator must be updated in your AltEVV system and resubmitted to the CalEVV Aggregator. Please contact your AltEVV software vendor for any questions on how to update and resubmit EVV data to CalEVV.

AltEVV Vendor Specifications

CalEVV integration requires the AltEVV third-party software vendor to work with Sandata to ensure that the CalEVV Aggregator receives AltEVV data in the correct format. Please share the following information with your AltEVV vendor to ensure that they are sending data in the correct format:

- [AltEVV Vendor Specification](#)
- [Specification User Guide](#)

Resolving Visit Exceptions

A "Visit Exception" is defined as an error in a visit record which has either incorrect data, data that does not match, or data that is incomplete. A visit exception will display a red dot in the Visit column for the Visit Record and it will show in your Visit Results in the CalEVV Aggregator. To resolve these exceptions, the incorrect visit data must be corrected in your AltEVV system and resent to the CalEVV Aggregator. For instructions on how to update and resend data from your AltEVV system, providers must reach out to your AltEVV vendor and refer to the AltEVV Vendor Specification linked above. Please note: If visit exceptions are not fixed and indicate a "VERIFIED" status, the visit will still be considered out of compliance.

Duplicate Client Records/Inactivating Clients

The client Medicaid ID field cannot be edited after client creation. Any changes to the Medicaid ID without first inactivating the previous client record can result in a duplicate. Please ensure that any changes to the Medicaid ID, including inactivating the previous client record, are made before resubmitting to avoid duplicate records.

Here are the steps to take when updating the client Medicaid ID:

- Identify the client record with the incorrect Medicaid ID.
- Update the client status in the JSON file to "inactive".

- To inactivate the client record, provide "04" as the Client Status field in the Client/Payer/Information section of the client record.

- Resend the client record JSON file to CalEVV Aggregator (Sandata) with a "ClientStatus" value of "02."

- Once the first client record is inactive, you can then send the new client record file with the correct Medicaid ID.

Updating Client Data

With the exception of the "ClientIdentifier" field and the "ClientMedicaidID" field, most client data fields can be updated. To update client information, use the "SequenceID" field to indicate a new version of the client record, and resubmit with the updated information.

For example, to update a client's associated Payer information, you can update the record in two ways:

- Using the AltEVV system, identify the client record that needs to be updated. This may require you to edit a client record in your AltEVV system.

    - Send the Client data with an updated "SequenceID" and directly replace the incorrect "ClientPayerInformation" records with correct "ClientPayerInformation" records.

- Send the Client data with an updated "SequenceID" and a "ClientStatus" value of "04" for the incorrect "ClientPayerInformation" data; then send a further updated SequenceID and provide the new, correct "ClientPayerInformation" data with a "ClientStatus" value of "02."

Data Integrity

To correct Client-Payer-JE data sent to CalEVV by a third-party vendor, the necessary steps may vary depending on the vendor and system tools you have available:

- You may be able to update the original Client-Payer data to replace the incorrect JE with the correct one. This new version of the client record can be sent to Sandata directly or with an updated SequenceID to mark it as the most recent update.

- To update your Client-Payer-JE data, the current JSON file that is being sent needs to be updated with the correct information. The only update to the JSON file should be the Jurisdiction ID. Do not change the date if you are correcting the Jurisdiction ID only. Please ask your vendor to update the Jurisdiction ID by using the JSON file is provided below:

```
OLD JSON:
"ClientPayerInformation": [
    {
        "PayerID": "CADDS",
```

```
                "PayerProgram": "PCS",
                "ProcedureCode": "Z9029",
                "EffectiveStartDate": "2024-04-14",
                "ClientStatus": "02",
                "JurisdictionID": "[Incorrect JE ID]"
            }
        ]
    NEW JSON:
    "ClientPayerInformation": [
            {
                "PayerID": "CADDS",
                "PayerProgram": "PCS",
                "ProcedureCode": "Z9029",
                "EffectiveStartDate": "2024-04-14",
                "ClientStatus": "02",
                "JurisdictionID": "[Correct JE ID]"
            }
        ]
```

Contact Sandata

If you have further questions, reach out to Sandata Customer Care:

Email: CAAltEVV@Sandata.com
Phone: (855) 943-6069