

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:

- The type of service performed
- The individual receiving the service
- The date of the service
- The location of service delivery
- The individual providing the service
- The time the service begins and end

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:

- Department of Health Care Services (DHCS) at EVV@dhcs.ca.gov
- Department of Developmental Services (DDS) at EVV@dds.ca.gov
- California Department of Aging (CDA) at EVV@aging.ca.gov
- California Department of Public Health (CDPH) at CDPHMCWP@cdph.ca.gov
- 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 identifiers [NPI (National Provider Identifier), 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 is **still required** to self-register with CalEVV. If you need to register, please use this link: 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 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 new provider agency production credentials to share with their AltEVV Vendor 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 self-registers and advises of the selected vendor of choice.
2. AltEVV Provider and vendor are acknowledged and advised of Next Steps:
    a. Training (Provider)
    b. Testing or Production Credentials (Vendor)
3. AltEVV Vendor registers in the Vendor Self-Registration Portal and links to the AltEVV Provider with whom they are associated.
4. AltEVV Vendor completes testing in vendor portal.

Once validated, the AltEVV Vendor Portal generates the Welcome Letter to AltEVV Provider via a Zendesk (Help Desk) Ticket. The vendor generates production credentials; then a secure email will be sent to the vendor with their username and password.

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
- CalEVV 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 to a claim, 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, you 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 **Medicaid ID field cannot be edited after a client is created**. If you need to change the Medicaid ID (Client Index Number (CIN) or Unique Client Identifier (UCI), you must **first inactivate the existing client record** before submitting the update. Failing to inactivate the previous record before resubmitting will create a duplicate in Sandata.

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

Duplicate Visit Records

A duplicate visit is identified when two (2) visit records share the same seven (7) specific data elements. Visit records that match another visit in *Verified* status will be placed in *Omit* status. Only the most recent visit will remain in a *Verified* status. The AltEVV system will automatically *Omit* duplicate visits. If you believe the visit shouldn't be in Omit status, please reach out to your vendor to resubmit the correct information for the visit.

Duplicate visits share the following seven (7) data elements:

- Provider ID
- Account Number
- Client ID
- Employee ID
- Type of Service
- Begin Time
- End Time

If you believe the visit should not be in *Omit* status, please reach out to your vendor to resubmit the correct information for the visit.

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:

- Send the Client data with an updated “SequenceID” and directly replace the incorrect ClientPayerInformation records with correct “ClientPayer” Information 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.

- If you cannot update the original Client-Payer-JE data directly, then you will need to change the start and end dates of the incorrect Client-Payer authorization data to a) start and end on the same day, where b) the start and end day is a day on which no visits for the client occurred. Once this is done you can submit new Client-Payer data with the correct JE.

- 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. An example of how to update the Jurisdiction ID in 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