Pennsylvania - EVV Aggregation

Electronic Visit Verification (EVV) tracks and monitors timely service delivery and access to care for members. EVV applies to all providers of these services, including paid family direct care workers. EVV is a federal requirement and is a mandatory program. All individuals who receive services from Pennsylvania Department of Human Services (DHS) must participate.

The services impacted are:

- Personal Assistance Services (PAS)
- Home Health Services (HHS)
- Habilitation Services
- Respite Services

Important Websites

- Pennsylvania Department of Human Services (DHS): https://www.dhs.pa.gov/
- DHS EVV Webpage: https://www.dhs.pa.gov/providers/Billing-Info/Pages/EVV.aspx
- DHS EVV Technical Assistance: EVVtech@dhs.pa.gov

Provider Best Practices

- Identify team member(s) responsible for EVV visit maintenance
- Log in to your aggregator portal daily
- View EVV visits and aggregation status in the aggregator portal
- Triage EVV errors with your state and/or aggregator as a first point of contact
- Review DCI EVV Aggregation reports that are emailed to you daily
- Perform visit maintenance in DCI to correct visit errors
- Review all six required aggregation requirements
    - Type of service performed
    - Individual receiving the service
    - Date of the service
    - Location of the service
    - Individual providing the service
    - Time the service begins and ends
- Create, maintain and verify EVV Locations for clients (members)
- Review Social Security ID is required and the toggle button is selected Yes for "**Allow SSN Retrieval**" on the employee profile
- If the error in DCI can not be resolved independently, submit a help desk ticket (Zendesk) for DCI

If you have not already started, please begin these activities. Please be advised the aggregator portal is the source of truth for whether a visit is accepted or rejected.

Additional Pennsylvania EVV Aggregation Requirements:

EVV Locations

EVV locations are a required aggregation element for TMHP. In DCI, clients (members) can have multiple EVV Locations created for their profile and available for employees to select at the time of clock in and clock out via the mobile app or web portal. View the EVV Locations article in the DCI help center for information on how to create and manage DCI. Allowable EVV Locations (service locations) for TMHP are as follows: Member Home, Community, Family Home, and Neighbor Home.

Common EVV Aggregation Failure Results

Failure Reason	Sandata Field	DCI Field	Reasons why aggregation is failing	Steps to Update/Correct

Verified Visits /Entries	N/A	N/A	• This error may arise when visit/entries are updated and DCI sends the updated visit/entry. In the event you see duplicate visits/entries please open a DCI support ticket.	1. Login to Sandata 2. Navigate to Visit Review 3. Agency: Choose your agency 4. Filter to Client (and) Employee as necessary, or leave blank for date range of population 5. Select date range at minimum back to _______ as start date, and for end date choose today. 6. "Visit Status" = All 7. "Filter Visits By" = All visits 8. Click SEARCH 9. Once the visit results appear, click on the "Show Display Options" dropdown, this is located above Showing 1 to 50 of ##### entries 10. Make sure all options have a check mark 11. Click "Hide Display Options" to close the display options 12. Click EXPORT 13. Choose Excel 14. Locate the downloaded/exported file, file name ex. exportvisits 15. Attach the exported report to the DCI support ticket
Employee SSN Failed	EmployeeIdentifier	Employee Profile: SSN & Verify SSN > needs to be entered Allow SSN Retrieval > Select Yes	• Short version (4 digits) of SSN is being aggregated - full SSN required • Employee SSN is not entered into DCI	1. Log in to DCI 2. Click **Home** on the main menu 3. Click **Employees** on the sub menu 4. Use the filter to search for the employee, select the employee by clicking anywhere on the line in the table 5. Click the **Actions** button 6. Click **Edit Employee** in the Actions dropdown 7. The Edit Employee form wizard will open 8. On the **Basic Demographics** tab verify/update the following fields a. SSN and Verify SSN - enter SSN for employee b. Allow SSN Retrieval - select Yes 9. Click **Save** 10. Click **Yes** in the confirmation alert window
Procedure Code Failed	ProcedureCode	Service Code: Default HCPCS Code	• Missing default HCPCS code • Default HCPCS code incorrect	1. Log in to DCI 2. Click **Settings** on the main menu 3. Click **Funding** on the sub menu 4. Use the filter to search for the funding source, select it by clicking anywhere on the line in the table 5. Scroll down and select the **Service Code** tab 6. Select the **Service Code** with the error from the table 7. Click the **Actions** button 8. Click **Edit Service Code** in the Actions dropdown 9. The Edit Service Code form wizard will open 10. Update the **Default HCPCS Code** field 11. Click **Save** 12. Click **Yes** in the confirmation alert window
Client Address Value or Format Failed	ClientAddressLine1	Client Profile: Address	• Client address value incorrect (length should be between 1-30) • Client address format incorrect (can not contain special characters)	1. Log in to DCI 2. Click **Home** on the main menu 3. Click **Clients** on the sub menu 4. Use the filter to search for the client, select the client by clicking anywhere on the line in the table 5. Click the **Actions** button 6. Click **Edit Client** in the Actions dropdown 7. The Edit Client form wizard will open 8. On the **Basic Demographics** tab verify/update the following fields a. Address 9. Click **Save** 10. Click **Yes** in the confirmation alert window
Reason Code Missing (can't be null)	ChangeReasonMemo	Funding Source: Require Reason Code for Manual Entries > Select Yes	• Reason code required for manual entries setting on the funding source needs to be turned on	**Require Reason Codes for Manual Entries** 1. Log in to DCI 2. Click **Settings** on the main menu 3. Click **Funding Source** on the sub menu 4. Use the filter to search for the funding source, select it by clicking anywhere on the line in the table 5. Click the **Actions** button 6. Click **Edit Funding Source** in the Actions dropdown 7. The Edit Funding Source form wizard will open 8. Update the **Require Reason Code for Manual Entries** field to **Yes** 9. Click **Save** 10. Click **Yes** in the confirmation alert window

Reason Code Memo Needed (can't be null)	ChangeReasonMemo	Reason Code: Requires Free Text Note > Select Yes	• Free text note needs to be entered and required for specific reason codes	**<u>Add Reason Code and Require Free Text Note</u>** 1. Log in to DCI 2. Click **Settings** on the main menu 3. Click **Funding Source** on the sub menu 4. Use the filter to search for the funding source, select it by clicking anywhere on the line in the table 5. Click the **Actions** button 6. Click **Add Reason Code** in the Actions dropdown 7. Fill out the Reason Code form wizard a. Select **Yes** for the field **Requires Free Text Note** 8. Click **Save** 9. Click **Yes** in the confirmation alert window **<u>Edit Reason Code and Require Free Text Note</u>** 1. Log in to DCI 2. Click **Settings** on the main menu 3. Click **Funding Source** on the sub menu 4. Use the filter to search for the funding source, select it by clicking anywhere on the line in the table 5. Scroll down and select the **Reason Codes** tab 6. Select the **Reason Code** from the table 7. Click the **Actions** button 8. Click **Edit Reason Code** in the Actions dropdown 9. The Edit Reason Code form wizard will open 10. Update the **Requires Free Text Note** field to **Yes** 11. Click **Save** 12. Click **Yes** in the confirmation alert window
Live In Caregiver	N/A	Employee Service Account: Relationship Type > Select Live In Caregiver from the dropdown	• The relationship type live in caregiver is not selected	1. Log in to DCI 2. Click **Home** on the main menu 3. Click **Employees** on the sub menu 4. Use the filter to search for the employee, select the employee by clicking anywhere on the line in the table 5. Scroll down and select the **Accounts** tab 6. Select the **Account** from the table 7. Click the **Actions** button 8. Click **Edit Service Account** in the Actions dropdown 9. The Edit Service Account form wizard will open 10. Verify/update the Relationship Type field to Live In Caregiver by selecting it from the dropdown 11. Click **Save** 12. Click **Yes** in the confirmation alert window