

# California - 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. These services are provided in California through programs managed by the Department of Health Care Services (DHCS), the California Department of Social Services (CDSS), the Department of Developmental Services (DDS), the California Department of Public Health (CDPH), and the California Department of Aging (CDA). Note: Hospice and Behavioral Health Treatment (BHT) are not subject to EVV requirements.

## Programs impacted

- DHCS
- CDSS
- CDA
- CDPH
- BHT

## Important Websites

- [Sandata](#)
- [CDSS](#)
- [DHCS](#)

## 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
- 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.**

## State Specific Aggregation Topics

### EVV Locations

EVV locations are a required aggregation element for aggregation in CA. In DCI, clients (members) can have multiple EVV Locations created for their profile and available for employees to select at 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 in DCI. Allowable EVV Locations (service locations) for CA are as follows: Home or Community.

### Jurisdictional Entity

This is the identifier for the Jurisdictional Entity. CA Jurisdictional Entities include MSSP Sites, Counties, Regional Centers, and Waiver Agencies. In DCI this is often managed via a custom field on the Region. The jurisdictional ID often differs by payer, so this can be managed via a custom field on any level separated by payer.

## Common EVV Aggregation Failure Results

Failure Reason	Sandata Field	DCI Field	Reasons why aggregation is failing	Steps to Update/Correct
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Employee SSN Failed	EmployeeIdentifier	<p>Employee Profile:</p> <p>SSN &amp; Verify SSN &gt; needs to be entered</p> <p>Allow SSN Retrieval &gt; Select Yes</p>	<ul style="list-style-type: none"> <li>Short version (4 digits) of SSN is being aggregated - full SSN required</li> <li>Employee SSN is not entered into DCI</li> </ul>	<ol style="list-style-type: none"> <li>Log in to DCI</li> <li>Click <b>Home</b> on the main menu</li> <li>Click <b>Employees</b> on the sub menu</li> <li>Use the filter to search for the employee, select the employee by clicking anywhere on the line in the table</li> <li>Click the <b>Actions</b> button</li> <li>Click <b>Edit Employee</b> in the Actions dropdown</li> <li>The Edit Employee form wizard will open</li> <li>On the <b>Basic Demographics</b> tab verify/update the following fields <ol style="list-style-type: none"> <li>SSN and Verify SSN - enter SSN for employee</li> <li>Allow SSN Retrieval - select Yes</li> </ol> </li> <li>Click <b>Save</b></li> <li>Click <b>Yes</b> in the confirmation alert window</li> </ol>
Procedure Code Failed	ProcedureCode	<p>Service Code:</p> <p>Default HCPCS Code</p>	<ul style="list-style-type: none"> <li>Missing default HCPCS code</li> <li>Default HCPCS code incorrect</li> </ul>	<ol style="list-style-type: none"> <li>Log in to DCI</li> <li>Click <b>Settings</b> on the main menu</li> <li>Click <b>Funding</b> on the sub menu</li> <li>Use the filter to search for the funding source, select it by clicking anywhere on the line in the table</li> <li>Scroll down and select the <b>Service Code</b> tab</li> <li>Select the <b>Service Code</b> with the error from the table</li> <li>Click the <b>Actions</b> button</li> <li>Click <b>Edit Service Code</b> in the Actions dropdown</li> <li>The Edit Service Code form wizard will open</li> <li>Update the <b>Default HCPCS Code</b> field</li> <li>Click <b>Save</b></li> <li>Click <b>Yes</b> in the confirmation alert window</li> </ol>
Client Address Value or Format Failed	ClientAddressLine1	<p>Client Profile:</p> <p>Address</p>	<ul style="list-style-type: none"> <li>Client address value incorrect (length should be between 1-30)</li> <li>Client address format incorrect (can not contain special characters)</li> </ul>	<ol style="list-style-type: none"> <li>Log in to DCI</li> <li>Click <b>Home</b> on the main menu</li> <li>Click <b>Clients</b> on the sub menu</li> <li>Use the filter to search for the client, select the client by clicking anywhere on the line in the table</li> <li>Click the <b>Actions</b> button</li> <li>Click <b>Edit Client</b> in the Actions dropdown</li> <li>The Edit Client form wizard will open</li> <li>On the <b>Basic Demographics</b> tab verify/update the following fields <ol style="list-style-type: none"> <li>Address</li> </ol> </li> <li>Click <b>Save</b></li> <li>Click <b>Yes</b> in the confirmation alert window</li> </ol>
Reason Code Missing (can't be null)	ChangeReasonMemo	<p>Funding Source:</p> <p>Require Reason Code for Manual Entries &gt; Select Yes</p>	<ul style="list-style-type: none"> <li>Reason code required for manual entries setting on the funding source needs to be turned on</li> </ul>	<p><b><u>Add Reason Code and Require Free Text Note</u></b></p> <ol style="list-style-type: none"> <li>Log in to DCI</li> <li>Click <b>Settings</b> on the main menu</li> <li>Click <b>Funding Source</b> on the sub menu</li> <li>Use the filter to search for the funding source, select it by clicking anywhere on the line in the table</li> <li>Click the <b>Actions</b> button</li> <li>Click <b>Add Reason Code</b> in the Actions dropdown</li> <li>Fill out the Reason Code form wizard <ol style="list-style-type: none"> <li>Select <b>Yes</b> for the field <b>Requires Free Text Note</b></li> </ol> </li> <li>Click <b>Save</b></li> <li>Click <b>Yes</b> in the confirmation alert window</li> </ol> <p><b><u>Edit Reason Code and Require Free Text Note</u></b></p> <ol style="list-style-type: none"> <li>Log in to DCI</li> <li>Click <b>Settings</b> on the main menu</li> <li>Click <b>Funding Source</b> on the sub menu</li> <li>Use the filter to search for the funding source, select it by clicking anywhere on the line in the table</li> <li>Scroll down and select the <b>Reason Codes</b> tab</li> <li>Select the <b>Reason Code</b> from the table</li> <li>Click the <b>Actions</b> button</li> <li>Click <b>Edit Reason Code</b> in the Actions dropdown</li> <li>The Edit Reason Code form wizard will open</li> <li>Update the <b>Requires Free Text Note</b> field to <b>Yes</b></li> <li>Click <b>Save</b></li> <li>Click <b>Yes</b> in the confirmation alert window</li> </ol>
Live In Caregiver	N/A	<p>Employee Service Account:</p> <p>Relationship Type &gt; Select Live In Caregiver from the dropdown</p>	<ul style="list-style-type: none"> <li>The relationship type live in caregiver is not selected</li> </ul>	<ol style="list-style-type: none"> <li>Log in to DCI</li> <li>Click <b>Home</b> on the main menu</li> <li>Click <b>Employees</b> on the sub menu</li> <li>Use the filter to search for the employee, select the employee by clicking anywhere on the line in the table</li> <li>Scroll down and select the <b>Accounts</b> tab</li> <li>Select the <b>Account</b> from the table</li> <li>Click the <b>Actions</b> button</li> <li>Click <b>Edit Service Account</b> in the Actions dropdown</li> <li>The Edit Service Account form wizard will open</li> <li>Verify/update the Relationship Type field to Live In Caregiver by selecting it from the dropdown</li> <li>Click <b>Save</b></li> <li>Click <b>Yes</b> in the confirmation alert window</li> </ol>