

NAVIGATING EVV FOR FINANCIAL SUCCESS

homecare  **homebase**SM

TODAY'S AGENDA

- Struggles of EVV
- What is EVV Clearinghouse?
- Warning & Alerts
- Reports & Reconciling
- Self-Serve Tools
- Claims & Visit Maintenance
- Continue to Innovate



TODAY'S PRESENTERS



Jen Ball

Senior Product Manager

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21ST CENTURY CURES ACT

SIX DATA POINTS.....

- Service Type
- Individual receiving service
- Date of Service
- Location of service delivery
- Individual providing service
- Begin and end time of the service (punches)



21ST CENTURY CURES ACT

Building the plane while flying



PREPARING FOR EVV

- Know state EVV policies and rules
- Confirm all identifiers (provider, staff, patient)
- Ensure alignment of billing codes
- Ensure authorization aligns with identifiers
- Apply for credentials early
- Review aggregator portal setups
- Understanding RCM impacts
- Pre monitor staff behavior
- Aggregator training



TOP CHALLENGES

- Data Misalignment (51%)
 - Procedure Code Mismatches
 - Patient Medicaid ID
 - Payers not loading patients
 - NPI/Tax ID set up incorrectly
- Staff Behavior
- Scheduling Behaviors
- Insurance Mismatch
- Monitoring of Aggregator Portals
- Volume/Resourcing Impact



STRUGGLES THROUGH THE JOURNEY

- Managing EVV through multiple systems
- Submission to individual aggregators
- Reporting
- Reconciling
- Invoicing
- Claims Management





EVV Clearinghouse



INNOVATION



System Manager

Self-Serve configuration to define your EVV business setup.

Locations

Set up desired locations used to control information access and configuration

Access Levels

Define the grouping by which your portal users have access to content data.

Portal Users

Create and manage your portal user accounts.

SSO Setup

Provide the information required to enable single-sign-on with the HCHB EVV Product Suite.

Aggregator Setup

Define which State Aggregators your Agency will require EVV services to be setup.

Aggregator Glossary

Review the details of all Aggregator's in the system to understand which required fields, tasks, services and alerts are defined as required.

Billing Periods

Define your billing periods so the system can provide views and filtering to match your billing schedule.

Roles

Define the roles that can be applied to users of System Manager and EVV Clearinghouse.


Self-Serve Aggregator setup.

The screenshot displays the 'System Manager' interface for 'Aggregator Setup' under the 'PA-HHAX' configuration. The breadcrumb trail is 'Home / EVV Clearinghouse Configuration / Aggregator Setup / PA-HHAX'. The interface features five main configuration cards: 'Profile', 'Payer Mapping', 'Alert Remediation Rules', 'State Task Mapping', and 'Audit History'. Each card includes a title, a brief description, and a small icon in the top right corner. The 'Profile' card has a document icon, 'Payer Mapping' has a document icon, 'Alert Remediation Rules' has a warning triangle icon, 'State Task Mapping' has a list icon, and 'Audit History' has a plus icon.


System Manager

HOME TA Welcome back, Ted Generic Health Care LOGOUT


Home / EVV Clearinghouse Configuration / Aggregator Setup / PA-HHAX

Profile 


Review and manage the basic account information for this Aggregator.

Payer Mapping 


Map EVV Payer and Service codes used in this Aggregator.

Alert Remediation Rules 

Set the default 'reason' and 'resolution' codes to be used for each alert for this Aggregator.

State Task Mapping 

Map tasks created in the EHR to the required State Task list. If this Aggregator does not require State Tasks as part of the EVV visit this option will be disabled.

Audit History 

Review a full audit trail of changes and access of this Aggregator setup.

EVV Clearinghouse

Manage all your EVV operations from one dedicated and purpose-built tool.

EVV Submission

Submit your data to the Aggregator with ease avoiding rejections with SMART alerts to ensure a smooth claims process.

EVV Reconciliation

Review and filter in real-time the aggregator status for all visits.

EVV Adjustments

Adjust previously submitted visits including invoice changes, payer, procedure codes, and all aggregator required fields.

Federated SSO

Federated SSO provides increased security and employee satisfaction by reducing password fatigue.

Self-Serve Tools

The Self-Serve toolbox provided with EVV Clearinghouse will allow portal users to resolve issues independently and reduce support tickets.

Alerts

EVV Clearinghouse SMART alerts are automated to reduce manual touches and avoid aggregator rejections, driving employee satisfaction.

APP Switching

Quickly switch between HCHB applications without a new login.

Multi-Factor Authentication

MFA will provide your Organization additional security and reduce the risk of weak passwords.

APP SWITCHING

Quickly switch between different applications without a new login

- ✓ Employee Satisfaction
- ✓ Increased Productivity

The screenshot displays the EVV Clearinghouse application interface. At the top, there is a navigation bar with the EVV Clearinghouse logo and a search bar. Below the search bar, a sidebar menu is visible with the following options: EVV Clearinghouse Portal, CoreAttend Admin Portal, System Manager Portal, and Operations Team Portal. The main content area shows a table with the following columns: PLANNED, STARTED DATE/TIME, ENDED DATE/TIME, DURATION/DISTANCE/MI, and PATIENT NAME & ID. The table contains five rows of data, each with a status indicator (Sent, Accepted, Quoted, Rejected, Rejected) and a corresponding record ID.

| | | PLANNED | STARTED DATE/TIME | ENDED DATE/TIME | DURATION/DISTANCE/MI | PATIENT NAME & ID |
|----------|----------------------------------|-------------------------------------|--------------------|--------------------|----------------------|---------------------------|
| Sent | test_invoice | Sep 12, 2024 15:00 pm - 16:00 pm | Sep 12 10:04 pm | Sep 12 11:05 am | 2hr 3min | George Anderson (PAT-001) |
| Accepted | 4b762233-3c07-4673-af27-63fca95f | Sep 11, 2024 12:00 pm - 14:00 pm | Sep 11 12:05 pm | Sep 11 14:04 pm | 2hr 59min | George Anderson (PAT-001) |
| Quoted | 7c9c0231-0716-41de-8fad-3b290822 | Sep 10, 2024 12:00 pm - 14:00 pm | Sep 10 12:05 pm | Sep 10 14:04 pm | 2hr 59min | George Anderson (PAT-001) |
| Rejected | rejected05 | Sep 09, 2024 15:00 pm - 16:00 pm | Sep 09 15:04 pm | Sep 09 16:04 pm | 1hr 0min | Eva Pearson (PAT-002) |
| Rejected | 04855cfc-479b-4576-988d-8b8a0d | Sep 09, 2024 12:00 pm - 14:00 pm | Sep 09 12:05 pm | Sep 09 14:04 pm | 2hr 59min | George Anderson (PAT-001) |

At the bottom of the table, there is a "Show" dropdown menu set to "25".



COMMUNICATION WITH AGGREGATORS

EVVLink

DATA REQUIREMENTS PER STATE

Preventing or Resolving Rejections

WARNINGS CONSOLE

Correct issues prior to
scheduled care

- ✓ Avoid Rejections
- ✓ Avoid Alert Fatigue
- ✓ Copy Functions
- ✓ Filtering

The screenshot displays the EVV Clearinghouse interface. At the top, the header includes the logo, 'EVV Clearinghouse', and navigation links for 'SMART MONITOR', 'WARNINGS', and 'VISITS'. A user profile for 'Ted' is visible in the top right corner. The main content area is titled 'EVV Presubmission Data Warnings' and contains a summary of errors. Below the summary are two columns of warnings: 'Patient' and 'Staff'. The 'Patient' column lists: 'Patient State is missing' (96), 'Patient Medicaid ID is missing' (14), 'Patient Date Of Birth is Missing' (4), and 'Patient EVV ID is missing or invalid' (5). The 'Staff' column lists: 'Staff SSN is missing', 'Staff Email is missing', 'Staff Date of Birth is missing', and 'Staff EVV ID is missing'. A modal window titled 'PATIENT RECORD WARNINGS' is open on the right, showing a list of patients with their names and IDs, and a 'Copy full list' button.

| Category | Warning | Count |
|----------|--------------------------------------|-------|
| Patient | Patient State is missing | 96 |
| | Patient Medicaid ID is missing | 14 |
| | Patient Date Of Birth is Missing | 4 |
| | Patient EVV ID is missing or invalid | 5 |
| Staff | Staff SSN is missing | |
| | Staff Email is missing | |
| | Staff Date of Birth is missing | |
| | Staff EVV ID is missing | |



ALERTS

Self-Service Alert Monitoring

SELF-SERVICE CLEARING ALERTS

Select bulk alert clearing in the self-serve tools

- ✓ Defaults
- ✓ Auto-clear alerts
- ✓ Staff selection
- ✓ Aggregator or payer setup

System Manager

Home / EVV Clearinghouse Configuration / Aggregator Setup / PA-HHAX / Alert Remediation

Save current edits to change Payer view | Change Payer View

All Payers (default)

This Aggregator requires issue reasons and/or resolutions when an alert is triggered on a visit. If you want the system to auto-populate and resolve, avoiding and reducing manual intervention on each visit, then select a default for each alert type below. Note: N/A indicates not applicable for the alert type. You can customize per Payer using the "Change Payer View" menu above.

Associated Portal User: Arnold Adams (365)

| ALERT NAME | AUTO RESOLVE? | REASON | RESOLUTION |
|-------------------------------|---|--------------------------------------|-------------------------------|
| Cannot Verify Finish Geofence | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | Location outside of cell service | Contacted service coordinator |
| Cannot Verify Start Geofence | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | Location outside of cell service | Contacted service coordinator |
| Early Start | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | Attendant checked-in early | N/A |
| Finished Outside Geofence | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | Location outside of cell service | Contacted service coordinator |
| Late Start | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | Attendant checked-in early | Contacted service coordinator |
| Missed Visit | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | ChooClient unavailable/one... | Rescheduled |
| No Caller ID Match on start | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | Client does not have a phone in home | Contacted service coordinator |
| No Caller ID match on start | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | Client does not have a phone in home | Contacted service coordinator |
| No Client Signature | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | Client does not have a phone in home | Contacted service coordinator |
| Started Outside Geofence | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | Location outside of cell service | Contacted service coordinator |

Cancel Save



ALERTS

Hover for active alerts and filter for patient

- ✓ Filter to single patient
- ✓ Filter to payer
- ✓ Easily identify problems
- ✓ Track issues

The screenshot displays the 'EVV Visits' interface in the EVV Clearinghouse. The top navigation bar includes the application name, user profile, and system status. The main content area shows a table of visits with columns for EVV Status, Planned, Started, Ended, Duration, Patient Name & ID, Staff/Employee Name & ID, Aggregator Error/Response, and Payer ID. A red 'Issues' alert is overlaid on the table, indicating missing or incorrect EVV data for a specific visit. The right sidebar contains filter options for Payer, Staff, EVV Status, State, Aggregator Error, and Alerts.

| EVV STATUS | PLANNED | STARTED | ENDED | DURATION | PATIENT NAME & ID | STAFF/EMPLOYEE NAME & ID | AGGREGATOR ERROR/RESPONSE | PAYER ID |
|------------|-----------------------------|-------------------|-------------------|-----------|---------------------------|---------------------------|--------------------------------|----------|
| 1 | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr | William Brooks (2523) | Lloyd Logan (ATT-246) | patient ID not found in HHAX | 28162 |
| 1 | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr | Jeanette Reynolds (226) | Lloyd Logan (ATT-246) | | 28162 |
| | Nov 1 3:30 pm - 4:30 pm | Nov 1 4:51 PM | Nov 1 4:51 PM | 2hr 51min | Gregory Montgomery (2158) | Gabriel Hawkins (ATT-246) | | 18999 |
| | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr | Shawn Owen (738) | Gabriel Hawkins (ATT-246) | Cannot be imported prior to... | 28162 |
| | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr | Louis Hansen (2187) | Lillian Cannon (ATT-918) | | 18999 |
| | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:41 PM | 2hr 51min | Landon Phares (822) | Julie Lopez (ATT-324) | | 28162 |



ALERTS

Avoid rejections prior to aggregator submission:

- ✓ Avoid aggregator rejections
- ✓ Provide inline data entry
- ✓ Mass resolve, avoiding

The screenshot displays the EVV Clearinghouse interface. The top navigation bar includes 'EVV Clearinghouse', 'SMART MONITOR', 'WARNINGS', 'PEOPLE', 'EVV VISITS', and a user profile for 'Ted' with 'Welcome back, Ted' and 'Logout' options. The main content area is titled 'Visits / EVV' and features a search bar for 'Patient by Name or ID...' and a date range filter set to '2024-06-06 → 2024-06-06'. Below this, a table lists 7 results for visits. The table columns are EVV STATUS, PLANNED, STARTED, ENDED, DURATION, PATIENT NAME & ID, and STAFF. The rows show various visit statuses: Rejected, Accepted, and Sent, with corresponding dates and times.

| EVV STATUS | PLANNED | STARTED | ENDED | DURATION | PATIENT NAME & ID | STAFF |
|------------|-----------------------------|-------------------|-------------------|-------------|---------------------------|-----------|
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:01 pm | Oct 30 3:01 pm | 1 hr | William Brooks (2523) | Lloyd |
| Accepted | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:01 pm | Nov 1 3:01 pm | 1 hr | Jeanette Reynolds (228) | Lloyd |
| Sent | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 pm | 2 hr 51 min | Gregory Montgomery (1856) | Gabrielle |
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:01 pm | Oct 30 3:01 pm | 1 hr | Shawn Owen (738) | Gabrielle |
| Accepted | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:01 pm | Nov 1 3:01 pm | 1 hr | Lizzie Hansen (2187) | Lillian |
| Sent | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:01 pm | Oct 30 4:51 pm | 2 hr 51 min | Landon Phelps (831) | Julio |
| Sent | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:01 pm | Nov 1 3:01 pm | 1 hr | Ben Jamin | Julio |

The right-hand panel shows a detailed view for 'William Brooks (2523)'. It includes tabs for 'Overview', 'Alerts', 'EVV Details', 'Invoice', and 'Audit'. A message states: 'The following EVV data related issues exist, preventing submission to EVV.' Below this, a section titled 'Alerts needing manual correction' lists several issues:

- Missing or Invalid EVV Data:** Missing or invalid values for Patient Medicaid ID. A text input field for 'Patient Medicaid ID *' is shown.
- Missing State Task:** There were no State approved task(s) performed with this Activity. At least one must be provided. A dropdown menu for 'Tasks *' is shown.
- No Client Signature:** No client signature was obtained. A dropdown menu for 'Reason *' is shown.

A tip indicates: 'You can set default reasons to auto-resolve certain alerts in the System Manager'. Below this, a section titled 'Resolved Alerts' lists two types of alerts:

- Started Outside Geofence:** Started 606.669 MILES outside geofence (maximum 0.189 MILES permitted). Reason: Location outside of cell service. Acknowledged By: Ted Anders (142) - system auto-cleared: Jul 8, 2024 7:36 AM (CDT).
- Finished Outside Geofence:** Finished 606.669 MILES outside geofence (maximum 0.189 MILES permitted).



SELF-SERVICE CLEARING ALERTS

Alerts will trigger and automatically be put into the resolved section

- ✓ Reserve similar alerts
- ✓ Reduce duplicate data entry
- ✓ Increase productivity
- ✓ Default reason/resolution

Resolved Alerts

Started Outside Geofence

Started 606.669 MILES outside geofence (maximum 0.189 MILES permitted).

Reason: Location outside of cell service

Acknowledged By: Ted Anders (342) - system auto-cleared, Jul 8, 2024 7:16 AM (CDT)

Finished Outside Geofence

Finished 606.669 MILES outside geofence (maximum 0.189 MILES permitted).

Reason: Location outside of cell service

Acknowledged By: Ted Anders (342) - system auto-cleared, Jul 8, 2024 7:16 AM (CDT)

Late Start

Finished 11 minutes late (maximum 7 minutes permitted)

Reason: Location outside of cell service

Resolution: Contacted service coordinator

Acknowledged By: Ted Anders (342) - system auto-cleared, Jul 8, 2024 7:16 AM (CDT)

Cannot Verify Finish Geofence

Not enough information was available to verify started within geofence.

Reason: Location outside of cell service

Acknowledged By: Qadmin, CellTrak, Jul 8, 2024 7:16 AM (CDT)

Operational Alerts (via OTP)



REPORT FILTERING

What was sent to the aggregator?

REPORT FILTERING

Report filtering made easier with enhancements

- ✓ Flexible filters
- ✓ Multi-select
- ✓ Custom views

The screenshot displays the 'EVV Clearinghouse' interface. At the top, there's a navigation bar with 'EVV Clearinghouse' and user information 'Welcome back, Ted'. Below this, the 'EVV Visits' section features a search bar for 'Patient Name or ID', a date range selector for '2023-10-30' to '2023-11-01', and a 'Filters' button. The main area shows a table with 7 results, sorted by 'Newest First'. The table columns are: EVV STATUS, PLANNED, STARTED, ENDED, DURATION, PATIENT NAME & ID, STAFF/EMPLOYEE NAME & ID, ABBREVIATED RESPONSE, and PAYER ID. The rows show various visit statuses like 'Rejected', 'Accepted', and 'Sent' with corresponding dates, times, durations, and staff names. A right-hand sidebar contains filter options for 'Payer' (All), 'Staff' (All), and 'EVV Status' (All, Sent, Accepted, Credential Error, Rejected, Out of Date).

| EVV STATUS | PLANNED | STARTED | ENDED | DURATION | PATIENT NAME & ID | STAFF/EMPLOYEE NAME & ID | ABBREVIATED RESPONSE | PAYER ID |
|------------|-----------------------------|-------------------|-------------------|-----------|-------------------------|---------------------------|--------------------------------|----------|
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr | William Smith (2522) | Lloyd Logan (ATT-348) | patient ID not found in HHAIX | 28162 |
| Accepted | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr | Jeanette Reynolds (228) | Lloyd Logan (ATT-348) | | 28162 |
| Sent | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:53 PM | 2hr 51min | George Mouton (4816) | Gabriel Hawkins (ATT-240) | | 16999 |
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr | Shawn Owen (738) | Gabriel Hawkins (ATT-240) | Cannot be imported prior to... | 28162 |
| Sent | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr | Lizette Heisen (2107) | Lillian Carson (ATT-338) | | 16999 |
| Sent | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:53 PM | 2hr 51min | London Phelps (830) | Jake Lopez (ATT-320) | | 28162 |



RECONCILING DATA

What didn't go and why?

RECONCILING DATA

All data at your fingertips, removing the need for multiple systems

- ✓ Full audit
- ✓ History of submission
- ✓ Scheduled vs Actual

The screenshot displays the EVV Clearinghouse interface. The main header shows the application name and user information. Below the header, there are search filters for staff and patient names. A table lists 7 results of EVV visits with columns for status, planned, started, ended, and duration. A detailed view for a specific visit by Rolando Teachworth (PAT-001) is shown on the right, including tabs for Overview, EVV Details, Invoice, and Audit. The EVV Status Summary section indicates a 'Rejected' status with error messages. The Latest Submitted Time section shows the visit started and ended on July 12, 2022, with a duration of 1 hr 17 min and an adjustment reason of 'Forgot to log in/out'. The Scheduled Time section shows the planned date as July 11, 2022, and the planned time as 2:00 pm - 3:00 pm. The Additional Info section lists the staff as Jennifer Swalley (765), the patient as Rolando Teachworth (PAT-001), the activity ID as 23469346982021, and the schedule ID as 12345. An 'Open in OTP' button is located at the bottom of the detailed view.

| EVV STATUS | PLANNED | STARTED | ENDED | DURATION |
|------------|-----------------------------|-------------------|-------------------|----------|
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1 hr |
| Approved | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1 hr |
| Swit | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 PM | 2hr 5 |
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1 hr |
| Swit | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1 hr |
| Swit | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 PM | 2hr 5 |



EVV DETAILS

Self-Service Full History

EVV DETAILS

Customized views that best suits how you prefer to view data

- ✓ Show current details only
- ✓ View full history for auditing

The screenshot displays the EVV Clearinghouse interface. The main header shows the user's name 'Welcome back, Ted' and the role 'Genetic Health Care'. The 'EVV Visits' section on the left shows a table with 7 results, including columns for EVV STATUS, PLANNED, STARTED, ENDED, and DURATION. The detailed view on the right for 'Rolando Teachworth (PAT-001)' shows the 'EVV Details' tab selected, displaying a 'Billing' section with various fields and values.

| EVV STATUS | PLANNED | STARTED | ENDED | DURATION |
|------------|-----------------------------|-------------------|-------------------|----------|
| Planned | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr |
| Pending | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr |
| Start | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 PM | 2hr 5 |
| Approved | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr |
| Start | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr |
| Start | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 PM | 2hr 5 |

Billing

| EVV FIELD | CURRENT VALUE |
|----------------------|---------------|
| Payer ID | DH8783 |
| Procedure Code | W1793 |
| Revenue Code | 0440 |
| Rate | 18.75 |
| Units | 3 |
| Billed Amount | 56.25 |
| Auth Number | P00576588 |
| Invoice Number | 65987458 |
| Medicaid Provider ID | 23536846 |
| Medicaid ID | X6598987 |
| Staff SSN | ***** |
| Patient Payer ID | 6598477 |



EVV DETAILS

Toggle for full audit history

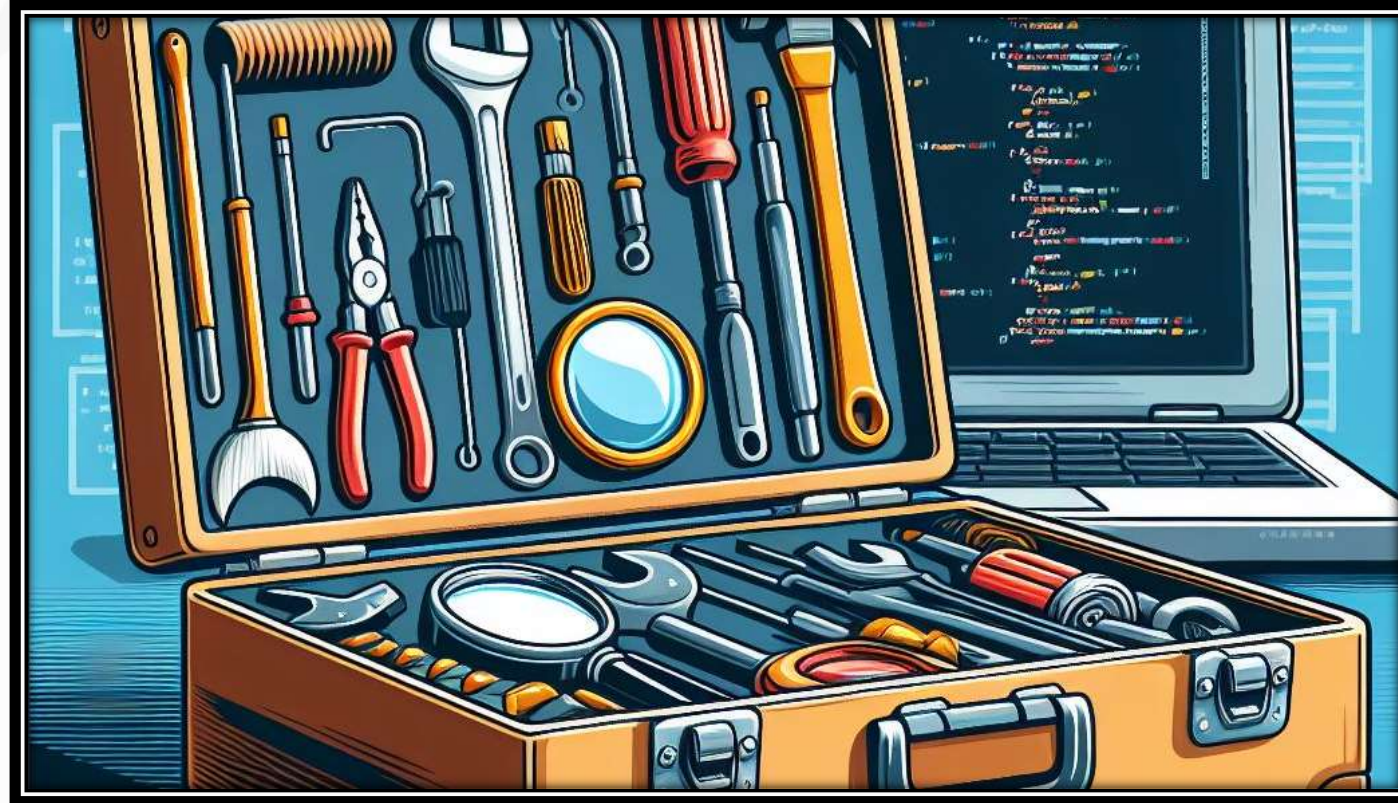
✓ Easily identify changes

✓ Flyout detailing who completed changes

The screenshot displays the EVV Clearinghouse interface. On the left, a table lists EVV visits with columns for EVV STATUS, PLANNED, STARTED, ENDED, and DURATION. The table shows 7 results, with some visits marked as 'Reached' or 'Said'. On the right, a detailed view for Rolando Teachworth (PAT-001) is shown. This view includes tabs for Overview, EVV Details, Invoice, Audit, and History. A 'Billing' section is visible, and an 'Adjustment Details' flyout is open, showing changes made by Terrance Anderson. The flyout lists 'Who', 'When', and 'Value' for three adjustments: DHB783, DHB459, and DHB143. At the bottom, there is a warning message: 'EVV data may need to be corrected in your source system (EMRL)' and buttons for 'Open in OTP' and 'Visit Maintenance'.



SELF-SERVE TOOLBOX



SELF SERVICE TOOLS

Take the guess work out by using the 're-export of rejected visits' tool

- ✓ Export "Rejected"
- ✓ Eliminate support tickets

The screenshot displays the EVV Clearinghouse interface. At the top, it says "EVV Clearinghouse" and "Welcome back, Ted". Below that, there's a search bar and a date range selector set to "2022-01-20" to "2022-01-26". The main section is titled "EVV Visits" and shows a table with 1434 results. The table has columns for EVV STATUS, PLANNED, STARTED, ENDED, DURATION, PATIENT NAME & ID, STAFF/EMPLOYEE NAME & ID, and AGGREGATOR ERROR. A tooltip for the "Re-export rejected visits" tool is visible, explaining that it re-exports rejected EVV visits and that only rejected visits from the current list will be loaded. On the right side, there are "BATCH TOOLS" including "Re-export Rejected Visits", "Convert Visit to EVV", and "Convert Visit to Non-EVV".

| EVV STATUS | PLANNED | STARTED | ENDED | DURATION | PATIENT NAME & ID | STAFF/EMPLOYEE NAME & ID | AGGREGATOR ERROR |
|------------|-----------------------------|-------------------|-------------------|-----------|--------------------------|---------------------------|--------------------------------|
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr | William Brooks (2523) | Lloyd Logan (ATT-346) | patient ID not fou |
| Accepted | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr | Jeanette Reynolds (278) | Lloyd Logan (ATT-346) | 2816; |
| Not | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 PM | 2hr 51min | Gregory Montgomery (858) | Gabriel Hawkins (ATT-241) | 1499; |
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr | Steven Owen (738) | Gabriel Hawkins (ATT-241) | Cannot be imported prior to... |
| Not | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr | Lizette Hansen (2987) | Lillian Carson (ATT-038) | 1499; |
| Not | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 PM | 2hr 51min | Landon Phelps (830) | Julie Lopez (ATT-324) | 2816; |



SELF SERVICE TOOLS

The Batch Actions feature saves time and eliminates duplication errors

✓ Select date range & activities

✓ Re-export to the aggregator

EVV Clearinghouse

RE-EXPORT REJECTED VISITS

Batch Actions - Confirm Selection

Confirm the following records for resubmission. 'Re-exporting' will resend the visits to the aggregator.

Date: 09/01/2023 - 09/18/2023 EVV Status: REJECTED

Effectuated Records

1000 results (max)

| EVV STATUS | SCHEDULED | STARTED | ENDED | DURATION | PATIENT | STAFF | AGGREGATOR ERROR/RESPONSE | NMR ID | PATIENT STATE | INVOICE |
|------------|-----------------------------|-------------------|-------------------|----------|------------------------------|-----------------------|------------------------------------|--------|---------------|---------|
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1 hr | Rolando Teachworth (PKT-001) | Julio Lopez (ATT-001) | service code inconsistency: You... | 28162 | PA | |
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1 hr | Rolando Teachworth (PKT-001) | Julio Lopez (ATT-001) | service code inconsistency: You... | 28162 | PA | |
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1 hr | Samuel Jennings (Q0154) | Julio Lopez (ATT-001) | Patient EVID is invalid | 16999 | PA | |
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1 hr | Samuel Jennings (Q0154) | Julio Lopez (ATT-001) | Patient EVID is invalid | 16999 | PA | |
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1 hr | Samuel Jennings (Q0154) | Julio Lopez (ATT-001) | Patient EVID is invalid | 16999 | PA | |
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1 hr | Samuel Jennings (Q0154) | Julio Lopez (ATT-001) | Patient EVID is invalid | 16999 | PA | |

Show: 100

Cancel Re-export



CONVERSION NON-EVV TO EVV

Scheduling Errors – Is it too late?

CONVERSION

Eliminate support tickets when converting visits from EVV to non-EVV

- ✓ Select 'Non-EVV Toggle'
- ✓ Select Patient
- ✓ Select Date Range
- ✓ Select Tool Option

The screenshot displays the 'EVV Clearinghouse' interface. At the top, there's a navigation bar with 'EVV Clearinghouse' and user information 'Welcome back, Ted'. Below this, the 'EVV Visits' section is active, with a search bar and date range filter set to '2023-10-30 → 2023-11-01'. A dropdown menu is open, showing options: 'Reexport Rejected Visits', 'Convert Visits to EVV', and 'Convert Visits to Non-EVV'. A tooltip explains that to convert visits from EVV, the list must be filtered to 'EVV' view, a single patient, and a date range, and that with these filters, 'Convert Visits to Non-EVV' should be selected. The main table lists 7 results with columns for EVV Status, Planned, Started, Ended, Duration, and Patient Name & ID. The table shows various visit statuses like 'Rejected', 'Accepted', and 'Sent' for different patients and dates.

| EVV STATUS | PLANNED | STARTED | ENDED | DURATION | PATIENT NAME & ID |
|------------|-----------------------------|-------------------|-------------------|-----------|---|
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr | William Brooks (2523) |
| Accepted | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr | Jeanette Reynolds (228) |
| Sent | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 PM | 2hr 51min | Gregory Montgomery (1856) Gabriel Hawkins (ATT-241) |
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr | Shawn Owen (738) Gabriel Hawkins (ATT-241) Cannot be imported prior to... |
| Sent | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr | Lizzie Hansen (2187) Lillian Carson (ATT-938) |
| Sent | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 PM | 2hr 51min | Landon Phelps (831) Julie Lopez (ATT-324) |



CONVERSION

Select which visits will be converted

- Confirm visits to convert
- Confirm visit to submit

EVV Clearinghouse

SMART MONITOR WARNINGS VISITS Welcome back, Ted Generic Health Care LOGOUT

CONVERT TO EVV
Batch Actions - Confirm Selection

Patient: Rolando Teachworth Date: 10/30/2023 - 11/01/2023

Confirm which visits you want to convert to EVV and submit to the State Aggregator, by selecting below.

Affected Records
6 results

| <input checked="" type="checkbox"/> PLANNED | STARTED | ENDED | DURATION | PATIENT NAME & ID | STAFF/EMPLOYEE NAME & ID |
|---|-------------------|-------------------|-----------|------------------------------|--------------------------|
| <input checked="" type="checkbox"/> Oct 30, 2023 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr | Rolando Teachworth (PAT-001) | Julio Lopez (ATT-001) |
| <input checked="" type="checkbox"/> Nov 1, 2023 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr | Rolando Teachworth (PAT-001) | Julio Lopez (ATT-001) |
| <input checked="" type="checkbox"/> Nov 3, 2023 2:00 pm - 3:00 pm | Nov 3 2:00 pm | Nov 3 4:51 PM | 2hr 51min | Rolando Teachworth (PAT-001) | Julio Lopez (ATT-001) |
| <input checked="" type="checkbox"/> Nov 7, 2023 2:00 pm - 3:00 pm | Nov 7 2:00 pm | Nov 7 3:00 pm | 1hr | Rolando Teachworth (PAT-001) | Julio Lopez (ATT-001) |
| <input checked="" type="checkbox"/> Nov 11, 2023 2:00 pm - 3:00 pm | Nov 11 2:00 pm | Nov 11 3:00 pm | 1hr | Rolando Teachworth (PAT-001) | Julio Lopez (ATT-001) |
| <input checked="" type="checkbox"/> Nov 16, 2023 2:00 pm - 3:00 pm | Nov 16 2:00 pm | Nov 16 4:51 PM | 2hr 51min | Rolando Teachworth (PAT-001) | Julio Lopez (ATT-001) |

Previous Cancel Next



CONVERSION

Select details to match claim

- ✓ Use smart wizard
- ✓ Reduce mistakes

The screenshot shows the 'EVV Clearinghouse' interface. At the top, there is a navigation bar with icons for 'SMART MONITOR', 'WARNINGS', and 'VISITS', along with a user profile for 'Ted' and a 'LOGOUT' button. The main content area is titled 'CONVERT TO EVV' and 'Batch Actions - Required Data'. It displays patient information: 'Patient Rolando Teachworth' and 'Date 10/30/2023 - 11/01/2023'. A message states: 'The following data is **required** to convert the selected visit records.' Below this, there are three dropdown menus: 'Aggregator*' with 'PA-HHAX' selected, 'Payer ID*' with '28162' selected, and 'Payer Program/Procedure Code*' with 'T1019' selected. At the bottom, there is a warning box: '⚠ These saved adjustments will not flow back to the EMR. Any adjustments that involve billing and claims will need to alternatively be updated in that system.' Navigation buttons 'Previous', 'Cancel', and 'Next' are located at the bottom of the form.



CONVERSION

Resolve missing data requirements or alerts within the wizard

- ✓ Enter required fields
- ✓ Enter state reason codes
- ✓ Avoid entering detail through alerts

EVV Clearinghouse

CONVERT TO EVV
Batch Actions - EVV Data

Patient: Rolando Teachworth Date: 10/30/2023 - 11/01/2023

The following data is required for the aggregator selected in the previous step. You can enter the value now for all selected visits, or you can skip this step and the alert "Missing or Invalid EVV Data" will trigger and you can enter the information at that time.

Provided Medicaid ID

Staff SSN: Sally Smith #378

Staff SSN: Danielle Anderson #938

⚠ These saved adjustments will not flow back to the EMR. Any adjustments that involve billing and claims will need to alternatively be updated in that system.

Previous Cancel **Next**



CONVERSION

Review changes before committing

- ✓ Summary change view
- ✓ Approval to submit
- ✓ Validate and remove risk of errors

EVV Clearinghouse

CONVERT TO EVV
Batch Actions - Confirmation

Patient: Rolando Teachworth Date: 10/30/2023 - 11/01/2023

Confirm the following changes, then commit. Committing will convert the visits to EVV.

Changed Fields

| FIELD | ORIGINAL VALUE | NEW VALUE | ACTION |
|-----------------------------------|----------------|--------------|----------------|
| Aggregator | - | PA-HHAX | Convert to EVV |
| Payer | - | 28162 | Convert to EVV |
| Payer Program/Procedure code | - | T1001 | Convert to EVV |
| Provided Medicaid ID | - | A2342342 | Convert to EVV |
| Staff SSN: Sally Smith #378 | - | 999-999-9999 | Convert to EVV |
| Staff SSN: Danielle Anderson #938 | - | 444-99-0000 | Convert to EVV |

Affected Records
7 results

| SCHEDULED | STARTED | ENDED | DURATION | PATIENT | STAFF |
|-----------------------------------|-------------------|-------------------|----------|------------------------------|-----------------------|
| Oct 30, 2023 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr | Rolando Teachworth (PAT-001) | Julio Lopez (ATT-001) |

Previous Cancel Commit



CLAIMS MANAGEMENT

How do I reconcile when my claim is denied?

CLAIMS MANAGEMENT

Hold sending the EVV data to the aggregator until invoice is created

- ✓ Most recent claim information
- ✓ Invoice history
- ✓ Claim details

The screenshot displays the EVV Clearinghouse interface. The main header shows the application name and user information. The left panel lists EVV visits with columns for status, planned, started, ended, and duration. The right panel shows a detailed view of an invoice for Rolando Teachworth (PAT-001), including tabs for Overview, EVV Details, Invoice(s), and Audit. The invoice details include the invoice number, received date, schedule ID, invoice line item, billed units, billing rate, billed amount, payer, payer program, procedure code, and revenue code.

| EVV STATUS | PLANNED | STARTED | ENDED | DURATION |
|------------|-----------------------------|-------------------|-------------------|----------|
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr |
| Pending | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr |
| Done | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 PM | 2hr 51 |
| Rejected | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr |
| Done | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr |
| Done | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 PM | 2hr 51 |

Invoice: #A659898

- Received: Apr 4, 2024
- Schedule Id: 30569
- Invoice Line Item: 3
- Billed Units: 8
- Billing Rate: 18.75
- Billed Amount: 150.00
- Payer: Payer 2
- Payer Program: Payer 2
- Procedure Code: T1-1502
- Revenue Code: a65475

Buttons: Open in OTP, Visit Maintenance



CLAIMS MANAGEMENT

Edit functionality within EVV Clearinghouse

- ✓ Edit invoice for resubmission
- ✓ Add invoice details for first submission

The screenshot displays the EVV Clearinghouse interface. The top navigation bar includes the logo, user name 'Welcome back, Ted', and a 'Logout' button. The main content area is divided into two panels. The left panel, titled 'EVV Visits', shows a table of 7 results with columns for 'EVV STATUS', 'PLANNED', 'STARTED', 'ORDER', and 'DURATION'. The right panel, titled 'VISIT # 46893 Rolando Teachworth (PAT-001)', provides a detailed view of a specific visit. It includes tabs for 'Overview', 'EVV Details', 'Invoice(s)', and 'Audit'. The 'Invoice(s)' tab is active, showing fields for 'Payer ID', 'Invoice Number', 'Invoice Line Item', 'Billed Rate', 'Billed Amount', and 'Billed Units'. A warning message at the bottom of the right panel states: 'These updated adjustments will not flow back to the EMR. Any adjustments that involve billing and claims will need to alternatively be updated in that system.' The interface also features a 'Show' dropdown set to '50' at the bottom left of the table.

| EVV STATUS | PLANNED | STARTED | ORDER | DURATION |
|------------|-----------------------------|-------------------|-------------------|----------|
| Planned | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr |
| Issued | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr |
| Send | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 PM | 2hr 5 |
| Planned | Oct 30 2:00 pm - 3:00 pm | Oct 30 2:00 pm | Oct 30 3:00 pm | 1hr |
| Send | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 3:00 pm | 1hr |
| Send | Nov 1 2:00 pm - 3:00 pm | Nov 1 2:00 pm | Nov 1 4:51 PM | 2hr 5 |



VISIT MAINTENANCE

How do I correct a visit after it has been sent?

VISIT MAINTENANCE

Edit visits for over auth, incorrectly scheduled, and those needing invoice changes

- ✓ Updates EHR and billing
- ✓ Avoids duplicate data entry
- ✓ Replacement claim created
- ✓ Update Visit to EVV

The screenshot displays the EVV Clearinghouse interface. The main header shows the logo and navigation options: SMART MONITOR, WARNINGS, VISITS, and a user profile for Ted. The 'EVV Visits' section contains a search bar and a table with 7 results. The table columns are EVV STATUS, PLANNED, STARTED, ENDED, and DURATION. The rows show various visit statuses (Planned, Arrived, Sent) and dates (Oct 30, Nov 1) with corresponding times and durations.

The detailed view for a visit by Rolando Teachworth (PAT-001) is shown on the right. It includes tabs for Overview, EVV Details, Invoice, and Audit. The EVV Details tab is active, showing fields for Start Date (Aug 31, 2021), Start Time (1:00 pm), End Date (Aug 31, 2021), End Time (2:00 pm), Duration (Placeholder), Payer ID (DHB763), Procedure Code (W1793), Revenue Code (DHB763), Rate (38.75), and Adjustment Reason (DHB763). A warning message at the bottom states: 'These updated adjustments will not flow back to the EMR. Any adjustments that involve billing and claims will need to alternatively be updated in that system.' Buttons for Cancel, Update & Send, and Update are visible at the bottom.



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WHAT'S NEXT?

Time for Innovation...

SMART MONITOR

Dashboard to view all rejections and how to fix them

- ✓ Group issues for easy resolution
- ✓ Create similar categories
- ✓ Easily see instructions

The screenshot displays the 'EVV Clearinghouse' dashboard for 'Smart Monitor - EVV Rejections'. The interface includes a navigation bar with 'SMART MONITOR', 'WARNINGS', and 'VISITS' tabs, and a user profile for 'Ted'.

REJECTION TYPES

- Staff SSN Missing: 18
- Duration cannot exceed 24 hrs: 5

TOTAL STAFF EFFECTED: 15

WHERE TO FIX: Clearinghouse

HOW TO FIX: Perform an adjustment to each Visit here in the Clearinghouse using the 'Visit Maintenance' action.

MAPPED AGGREGATOR RESPONSES

| | |
|--|-------------|
| Visit duration cannot exceed 24 hours | HHAeXchange |
| Visit is longer than 24 hours | SanData |
| Maximum length of a visit cannot be more than 24 hrs | Tellus |

EFFECTED VISIT RECORDS

| Visit Date Range | Staff | Client |
|---|------------------------------|-----------------------|
| June 14, 2024 - 10:00 am - June 15, 2024 - 11:00 am | Rolando Teachworth (PAT-001) | Julio Lopez (ATT-001) |
| May 2, 2024 - 9:00 am - May 3, 2024 - 11:00 am | Rolando Teachworth (PAT-001) | Julio Lopez (ATT-001) |
| May 1, 2024 - 11:00 am - May 25, 2024 - 12:00 pm | Rolando Teachworth (PAT-001) | Julio Lopez (ATT-001) |
| April 31, 2024 - 8:00 am - May 1, 2024 - 11:00 am | Rolando Teachworth (PAT-001) | Julio Lopez (ATT-001) |



REJECTION AUTOMATION

Defaulting and Automation

REJECTION AUTOMATION

Auto-resubmit rejected visits based on which rejection reason applies



Choose rejection reason



Choose time interval to



execute

System auto runs bulk re-exports and tracks it in audit log

The screenshot shows the 'System Manager' interface for 'EVV Automation Tools'. The breadcrumb trail is 'Home / EVV Clearinhouse Setup / EVV Automation Tools'. A descriptive text states: 'The system can auto-resubmit rejected visits based on which rejection reason applies to them. Add which rejection reasons you want the system to attempt resubmissions for, and at what time interval to execute.' Below this, there are two dropdown menus: 'Rejections Reason' (with 'Choose a reason...' selected) and 'Time Interval (Days)' (with 'Number of days...' selected). A '+ Reason' button is also present. A table below lists rejection reasons and their intervals:

| REJECTION REASON | INTERVAL | ACTIONS |
|--|----------|--------------|
| Patient EVV ID is invalid | 2 | [trash icon] |
| Service code inconsistency: You should only select RN service Code. | 2 | [trash icon] |
| Cannot be imported prior to patient SOC date or after patient discharge date | 2 | [trash icon] |
| patient ID not found in HHAX | 4 | [trash icon] |



WANT TO GET INVOLVED?



EVV CLEARINGHOUSE



USABILITY LABS



GENERAL QUESTIONS

Email Jen Ball, Sr. Product Manager, HCHB

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