California Electronic Visit Verification (CalEVV) Jurisdictional Entity Business Intelligence (BI) Training

March 2, 2023

Agenda

- Welcome and Introductions
- EVV Overview and Provider Compliance
- BI Tool Access and Function
- Demonstration
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- Resources
- Questions
- Survey

EVV Overview and Provider Compliance

Jurisdictional Entities (JE)

- Local organizations that pay and/or authorize providers for services and provide oversight of service delivery. They include:

  - Home and Community-Based Alternatives (HCBA) Waiver Agencies

  - Managed Care Plans (MCP)

  - California Children's Services (CCS) Counties

  - Department of Health Care Services (DHCS)

  - Regional Centers (RC)

  - Multipurpose Senior Services Program (MSSP) Sites

  - Medi-Cal Waiver Program (MCWP) Agencies

  - County In-Home Supportive Services (IHSS)

EVV Overview - Federal Mandate Requirements

The 21st Century Cures Act requires that the EVV system verify this visit information

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

California Department of AGING · California Department of PublicHealth · DDS · DHCS · CDSS CALIFORNIA DEPARTMENT OF SOCIAL SERVICES · Office of Systems Integration "SERVING CALIFORNIA"

EVV Overview

- All services provided in the home that are identified as Personal Care Services (PCS) or Home Health Care Services (HHCS) must have an EVV visit record in the CalEVV system.

- California implementation timeline:
  - PCS implemented on January 1, 2022
  - HHCS implemented on January 1, 2023

- Which providers are impacted?
  - For a complete list of services subject to EVV, please refer to DHCS' Provider Types and Codes or DDS' Service Codes subject to EVV.

Provider Compliance

- Compliance means providers are registered and submitting complete EVV visit data for services that are provided in the home.

    - Live-in caregivers are exempt from EVV requirements (see department website for more details).

- EVV visit data must be captured in the CalEVV system, or an alternate EVV system, at the time of the visit.

    - Manual entry or editing of a visit should only be done to ensure a compliant visit is recorded.

- EVV will not change where or how services are being provided.

- Providers will continue with existing authorization and billing processes.

- JEs to disseminate state department communications to impacted providers to ensure providers are receiving communications and are aware of EVV requirements and timelines.

BI Tool Access and Function

CalEVV Terminology

User: An individual with access to the BI tool.

Client: An individual who receives services subject to EVV requirements.

Employee: The individual who is providing the service to the recipient/client/member.

Call/Visit: A visit is a service provided during an in-person encounter to a client in the home.

Visit Exception: An indicator of missing information or details on the visit that need to be addressed.

BI Tool Terminology

DOMO: The business intelligence tool is powered by DOMO.

Cards: The visual representation of data.

Dashboard: A collection of cards that tell a story.

Favorites: A personalized dashboard with cards you have saved as favorites for quick access.

Dataset: When data have been brought into the BI tool, that data is represented as a dataset.

BI Tool Overview

The BI tool users can verify:

- If providers are registered and associated/linked to their specific JE.

- If Cures compliant EVV data are being submitted by their associated/linked providers.
    - The visit status (e.g., Incomplete, In Process, Omit, Processed, and Verified).

The BI tool user can also:

- View and access EVV data and submissions by their linked providers.

- Filter, drill down, and export reports allowing users to check certain segments of data.

- Use the favorites dashboard to quickly access frequently viewed cards.

BI Tool Overview
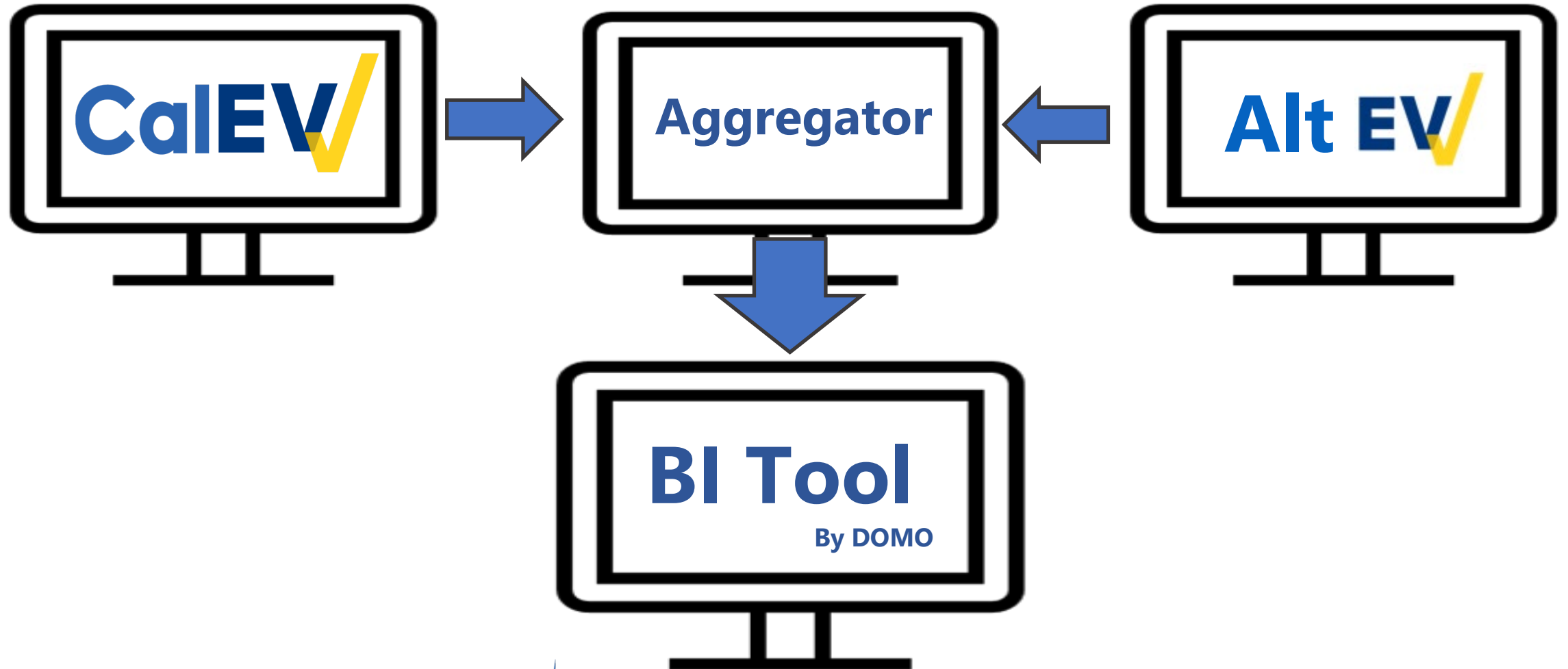
Supported Browsers

 Google Chrome

 Mozilla Firefox

 Microsoft Edge

 Safari

Getting Started – Logging in to the BI Tool

- Approved users will receive a welcome email with the subject line: "Congrats! You've been Domo'd!"

- Look for this email and be sure to check your spam filter.

- The email contains the link to set up your username and password.

- Bookmark the URL included in the email, https://sandata.domo.com, for easy access in the future.

Demonstration

Next Steps

Next Steps

- If BI Tool access is still needed, or if BI tool access should be removed, please follow the instructions below, according to your state agency.

  - **DHCS** – Entities listed below are authorized to email EVV@dhcs.ca.gov to ask for the Aggregator / Business Intelligence Tool Request form.
    - Counties – CCS Administrator or Medical Director
    - MCP – Primary or Secondary contact
    - HCBA Waiver Agency – Waiver Agency Administrator
  - **DDS** – RC staff can email EVV@dds.ca.gov copying the authorizing RC Executive
  - **California Department of Public Health** – Email Drew.Young@cdph.ca.gov to ask for the Aggregator / Business Intelligence Tool Request form.
  - **California Department of Aging** – Email CA Customer Care to request access at CACustomerCare@Sandata.com to begin CDA's review/approval process.

Resources

CalEVV Helpful Resources

- DHCS EVV webpage: https://www.dhcs.ca.gov/provgovpart/Pages/EVV.aspx

- DDS EVV webpage: https://www.dds.ca.gov/services/evv/

- Aggregator/BI training video: https://sandata.zendesk.com/hc/en-us/articles/5125132454931--California-BI-JE-Users-Video-Library (must be registered and logged in)

- For CalEVV Technical Support:

  - Email CACustomerCare@sandata.com

  - Phone: 1 (855) 943-6070

Questions?

Survey

- Link to survey: [Sandata BI Virtual Training Survey (surveymonkey.com)](surveymonkey.com)

- QR code