

Skilled Electronic Visit Verification

myUnity Enterprise Setup Guide



Netsmart

www.ntst.com

1959 East Kerr Street
Springfield, MO 65803

Contents

Overview	4
Set-Up	5
Organizational Structure	5
Enterprise Setup – NTST to Complete.....	5
Clinical Agency Setup – NTST to complete	6
Clinical Setup – NTST to complete	6
Clinical Alert Setup – NTST	7
Entities Libraries	9
Visit Editor Layout	12
Address Validation	13
Demographic Address Validation.....	13
Visit Editor Address Validation.....	13
Location Capture on Visit Documentation	14
Visit Correction	16
Visit Submission Process	16
Releasing and Submitting Visits	16
Rejected Visits.....	17
Patient Required Fields	18
California Setup.....	19
Patient EVV ID	19
EVV Jurisdiction	19
Authorization	20
Arizona Setup.....	20
EVV Contingency Security Setup	20
EVV Contingency	21
Patient Designee	21
Patient Designee Signature	22

Task Refusal23

Overview

The 21st Century Cures Act mandates that states implement EVV for all Medicaid personal care services (PCS) by January 1, 2021 and home health care services (HHCS) that require an in-home visit by a provider by January 1, 2023.

Agencies will use Mobile Caregiver or CellTrak to capture the required EVV data (Clock In, Clock Out, Location [GPS coordinates], Service, Patient Verification) for personal care services. *To utilize GPS capture functionality, a tablet or phone device must be used which natively supports location capture.*

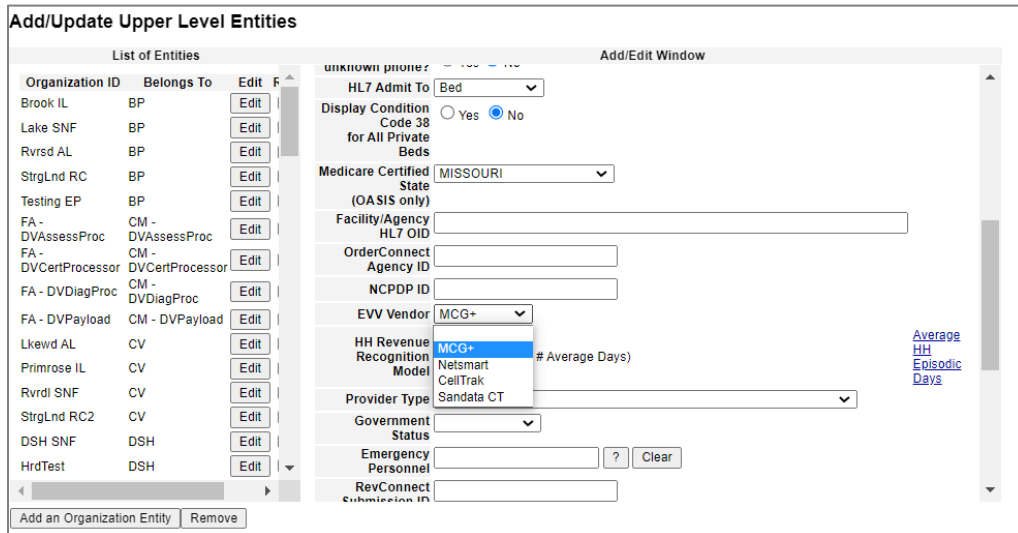
Workflow:

1. Information will flow from myUnity to Mobile Caregiver+:
 - a. Patients
 - b. Patient Insurance Plan
2. Information will flow from myUnity to the Mobile Caregiver+ Portal for validation:
 - a. GPS coordinates
 - b. Visit and Task details
3. Validated information will flow from the Mobile Caregiver+ to the EVV state aggregator.

Set-Up

Organizational Structure

- Navigate to Setup > Org Struct > Add/Update Upper Level Entities
- Choose Facility, and select appropriate organization
- Choose EVV Vendor: MCG+



Enterprise Setup – NTST to Complete

Setup>System>General>Enterprise Setup

Address Validation Setup



- Edit and Enter Virtual Earth API URL
- Save
- Edit and Enter Virtual Earth API Key
- Save

MCG+ Admin Portal Setup



- Request Tenant Identifier (Site UUID) from ID team

ESS-Inbound Settings

ESS-Inbound URL

ESS-Inbound Auth Key

- Edit and Enter ESS-Inbound URL for appropriate stack – Select Save
- Edit and Enter ESS-Inbound Auth Key for appropriate stack – Select Save

Clinical Agency Setup – NTST to complete

myUnity Support or Consulting will need to assist with this step.

- Navigate to myUnity Enterprise Clinical>Agencies
- Select the appropriate Agency
- Select EVV Vendor

Override Config Options

PPS Plus Integration Method	(Default Method) <input type="button" value="i"/>	EVV Vendor	MCG+ <input type="button" value="i"/>
PPS Plus Customer Import Key	<input type="text"/> <input type="button" value="i"/>	PPS Plus Web Service Vendor Key	<input type="text"/> <input type="button" value="i"/>
OBQI DB Password	<input type="text"/> <input type="button" value="i"/>	OBQI DB Server	<input type="text"/> <input type="button" value="i"/> (Select an EVV Vendor) Celltrak <input type="button" value="i"/> Sandata <input type="button" value="i"/> NTST <input type="button" value="i"/> MCG+ <input type="button" value="i"/>
OBQI Password	<input type="text"/> <input type="button" value="i"/>	OBQI DB Username	<input type="text"/> <input type="button" value="i"/>
OBQI Username	<input type="text"/> <input type="button" value="i"/>	OBQI Username	<input type="text"/> <input type="button" value="i"/>
Enable DME Export	<input type="radio"/> Yes <input checked="" type="radio"/> No	Secure Communication	<input checked="" type="radio"/> Yes <input type="radio"/> No
Current Logo File	<input type="text"/>	Choose Logo	<input type="button" value="Choose File"/> No file chosen <input type="button" value="i"/>
		Current Logo	<input type="text"/>

Clinical Setup – NTST to complete

Forms

All visit forms that will be used for EVV location capture need to be updated to enable capture location.

HHSOS>Forms Overview>

Select Modify Form on the form to be updated.

Capture Location: Yes No

- Scroll to Capture location: Select Yes

EVV Visit Note Outbound: Yes No

- Scroll to EVV Visit Note Outbound: Select Yes
- Select Submit
- Repeat for any forms that are visit forms to capture

Security

HHSOS>User Types Overview>

Select Allow Modify EVV Time

This permission should only be given to the Super Admin Role. It allows for the updating of the start / completion time after the clock in / clock out has occurred. ***Clinicians should not have this option.***

Modify Permission

Permission: Allow Modify EVV Time

Select the user types to be associated with this permission.

<div style="border: 1px solid gray; padding: 5px; height: 150px;"> COTA - Certified Occupational Therapist Assistant Forms Review Guest HealthCheck HHA - Home Health Aide LVN - Licensed Vocational Nurse Mobile Services MSW - Medical Social Worker OT - Occupational Therapist PD Personal Care Physician PT - Physical Therapist PTA - Physical Therapist Assistant RD - Registered Dietitian RN - Nurse RN Private Duty </div>	Add --> <-- Remove	<div style="border: 1px solid gray; padding: 5px; height: 150px;"> Super Admin HHSOS Admin </div>
---	---------------------------	--

Clinical Alert Setup – NTST

HHSOS>Edit Config>

Enable Alerting Engine: Yes No

Show Clinical Group/Comorbidity alerts: Yes No

- Enable Alerting Engine: Yes

HHSOS>User Types Overview

Modify Permission

Permission: Alerting Engine

Select the user types to be associated with this permission.

Bereavement Chaplain COTA - Certified Occupational Therapist Assistant Forms Review Guest HealthCheck Caregiver Licensed Practical Nurse Mobile Services MSW - Medical Social Worker Nurse Practitioner OT - Occupational Therapist PD Personal Care Physician PT - Physical Therapist PTA - Physical Therapist Assistant	Add --> <-- Remove	Super Admin HHSOS Admin Clinical Supervisor
--	-----------------------	---

Submit

- Select Super Admin, HHSOS and any other clinical role that will need to review EVV alerts.

Modify Permission

Permission: Alert Service Configuration Access

Select the user types to be associated with this permission.

Bereavement Chaplain COTA - Certified Occupational Therapist Assistant Forms Review Guest HealthCheck Caregiver Licensed Practical Nurse Mobile Services MSW - Medical Social Worker Nurse Practitioner OT - Occupational Therapist PD Personal Care Physician PT - Physical Therapist PTA - Physical Therapist Assistant	Add --> <-- Remove	HHSOS Admin
--	-----------------------	-------------








Submit

- Alert Service Configuration Access: HHSOS.

Libraries

- Physician
- Religion
- Task
- Task Type
- Team
- Billing codes
- Care Plan Templates
- Cosigners
- Alert Service

- Select the Library: Alert Service.

EVV ALERT		
DESCRIPTION	ASSIGNED USER TYPES	OPTIONS
EVV Client	Super Admin, HHSOS Admin, Clinical Supervisor	
EVV Resource	Super Admin, HHSOS Admin, Clinical Supervisor	
EVV Appointment	Super Admin, HHSOS Admin, Clinical Supervisor	
EVV Visit Start	Super Admin, HHSOS Admin, Clinical Supervisor	
EVV Visit Update	Super Admin, HHSOS Admin, Clinical Supervisor	
EVV Visit Documented	Super Admin, HHSOS Admin, Clinical Supervisor	
EVV Visit Submission Status	Super Admin, HHSOS Admin, Clinical Supervisor	

- Select the EVV Tab.
- Select Options icon on each alert.

EVVAlert-UserType Mapping ✕

User Type:

Super Admin
HHSOS Admin
Clinical Supervisor

select an usertypes

Save
Cancel

- Add the user types to match those user types who have access to the alerting engine to see EVV Alerts.
- Select Save.

Clinical Web Service User Setup - NTST

- Create ID ticket so that the EVV Enricher service can hit the Clinical inbound. Only needs to be done once per site. Template: [POPS-7120](#)

Entities Libraries

Payer/Plan Updates

- Navigate to Setup > Entities > Payers > Add/Update Payers and Plans
- Select applicable plan and then select More Info.
- Under Electronic Visit Verification (EVV) and Reporting
 - For Netsmart Mobile Caregiver+ solution:
 - select Yes for 'Included in Reporting Mandate'.

- Requires Aggregator Claim Generation (MCG+): Enable if there is a separate system that will create claims such as HHA Exchange or if Netsmart is the aggregator (e.g. Georgia Medicaid). Emedny and Sandata would be set to no.
- State or Aggregator Payer ID:
 - If the Payer/Plan does not require State submission, leave Blank. The visits will go to the generic non-EVV Payer (CRNO) in MCG+.
 - If the Payer/Plan does require State submission, match the respective values from MCG+ Provider Portal.

Electronic Visit Verification (EVV) and Reporting	
Included in Reporting Mandate	<input checked="" type="radio"/> Yes <input type="radio"/> No
Requires Aggregator Claim Generation (MCG+)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Send EVV Update for External Billing (Legacy MCG)	<input type="radio"/> Yes <input checked="" type="radio"/> No
State or Aggregator Payer ID	<input type="text"/>
State or Aggregator Plan ID	<input type="text"/>
State or Aggregator Program ID	<input type="text"/>
Newborn Time Period	0 <input type="text"/> Days <input type="button" value="v"/>

Electronic Visit Verification (EVV) and Reporting	
Included in Reporting Mandate	<input checked="" type="radio"/> Yes <input type="radio"/> No
Requires Aggregator Claim Generation (MCG+)	<input type="radio"/> Yes <input checked="" type="radio"/> No
Send EVV Update for External Billing (Legacy MCG)	<input type="radio"/> Yes <input checked="" type="radio"/> No
State or Aggregator Payer ID	<input type="text" value="NYMC"/>
State or Aggregator Plan ID	<input type="text"/>
State or Aggregator Program ID	<input type="text"/>

Products and Services Libraries

- Navigate to Financial > Products and Services > Products and Services Setup
- Select the applicable service and scroll down to Clinical/Visit Settings.
 - EVV Enabled? Will default to No.
 - Set to Yes on any services that will be involved in EVV, like Aide Services.

Clinical/Visit Settings	
Mobile View Enabled?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Visit Note Mileage Service?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Telephony Enabled?	<input type="radio"/> Yes <input checked="" type="radio"/> No
EVV Enabled?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Include in Auto Mileage/Travel Allocation?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="button" value="i"/>

Products and Services Setup

* Denotes required field

ID: Effective Date: Begin Date: 01/01/2000 End Date:

* Description: [Select a Touchscreen Image](#) [Related Items](#)
[Reimbursement Rules](#)

* Charge Master Type: Product Service

* Unit Of Measure:

General Settings

Sales Tax Exempt? Yes No

Calculate Qty Based on # of Days? Yes No

Bill to MCR-87 (LTC) Yes No

Zero-Price-Based, Apply Markup Percent? Yes No Use Setting for Service Type

Default Scheduling Duration: Minutes

Scheduling Authorization Exempt? Yes No

Billing Codes

ID Qualifier:

CPT Code:

HCPCS Code:

Revenue Code:

NDC Code:

Med Unit Type:

Taxonomy Number:

Place of Service (CMS1500):

Display Service Description on 837? Yes No

[Plan Override Billing Codes](#)
[Conditional Modifiers](#)

- Billing codes are required for each service per EVV payer and can be setup by selecting Plan Override Billing Codes

Add/Update Plan Billing Codes

Select a Payer -- Plan Id / Plan Description

List of Plan BillingCodes

Service or Product	CPT Code	HCPCS Code	Revenue Code	Taxonomy Number	
HH SN Routine Visit		G0154	0504		Edit
HHHourlyAideVisit		TEVV2	0504		Edit
DJH PT EVAL FLATRATE		TEVV3	0501		Edit
DJH EVV Aide Visit	TEVV2	tevv2	0403		Edit

Please add a new Plan Billing Code for Bed Characteristics.

Editor Window

Use Service or Bed Characteristic Service Bed Characteristic

Service or Product:

ID Qualifier:

CPT Code:

HCPCS Code:

Revenue Code:

NDC Code:

Med Unit Type:

Taxonomy Number:

Display Service Description on 837? Yes No

- Select the Payer
- Select Add New Item

Add/Update Plan Billing Codes

Select a Payer -- Plan Id / Plan Description

List of Plan BillingCodes

Service or Product	CPT Code	HCPCS Code	Revenue Code	Taxonomy Number	
HH SN Routine Visit		G0154	0504		Edit
HHHourlyAideVisit		TEVV2	0504		Edit
DJH PT EVAL FLATRATE		TEVV3	0501		Edit
DJH EVV Aide Visit	TEVV2	tevv2	0403		Edit

Please add a new Plan Billing Code for Bed Characteristics.

Editor Window

Use Service or Bed Characteristic Service Bed Characteristic

Service or Product:

ID Qualifier:

CPT Code:

HCPCS Code:

Revenue Code:

NDC Code:

Med Unit Type:


Taxonomy Number:

Display Service Description on 837? Yes No

- Select the Service
- Enter the codes and modifiers appropriate for the payer for this service
- Select Add/Update


Visit Editor Layout

Setup>Scheduling>General>Visit Editor Layout

 Save

Visit Editor Layouts

List Window

Description	
myUnity	
Services Completion	
Telephony	

- Select the Visit Editor Layout to be updated

Editor Window

Description

Lookup Service ID From Task Codes Yes No

Is Reserved Yes No

	Field Name	Include Column	Label	Carry Forward
▼	Status Icon	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
▼▲	Edit	<input checked="" type="checkbox"/>	<input type="text" value="Edit"/>	<input type="checkbox"/>
▼▲	Start Date	<input checked="" type="checkbox"/>	<input type="text" value="Start Date"/>	<input type="checkbox"/>
▼▲	Time In	<input checked="" type="checkbox"/>	<input type="text" value="Time In"/>	<input type="checkbox"/>
▼▲	End Date	<input checked="" type="checkbox"/>	<input type="text" value="End Date"/>	<input type="checkbox"/>
▼▲	Time Out	<input checked="" type="checkbox"/>	<input type="text" value="Time Out"/>	<input type="checkbox"/>
▼▲	Hours (Read Only)	<input checked="" type="checkbox"/>	<input type="text" value="Total Hours"/>	<input type="checkbox"/>
▼▲	Service ID	<input checked="" type="checkbox"/>	<input type="text" value="Service ID"/>	<input checked="" type="checkbox"/>
▼▲	Service Description	<input checked="" type="checkbox"/>	<input type="text" value="Service"/>	<input type="checkbox"/>
▼▲	Client Name	<input checked="" type="checkbox"/>	<input type="text" value="Resident Name"/>	<input checked="" type="checkbox"/>
▼▲	Admit ID	<input checked="" type="checkbox"/>	<input type="text" value="Admit ID"/>	<input checked="" type="checkbox"/>
▼▲	Personnel	<input checked="" type="checkbox"/>	<input type="text" value="Personnel"/>	<input checked="" type="checkbox"/>
▼▲	Mileage Qty	<input checked="" type="checkbox"/>	<input type="text" value="Mileage"/>	<input type="checkbox"/>
▼▲	Doc	<input checked="" type="checkbox"/>	<input type="text" value="Doc"/>	<input type="checkbox"/>
▼▲	Hold	<input checked="" type="checkbox"/>	<input type="text" value="Hold"/>	<input type="checkbox"/>
▼▲	Match Status	<input checked="" type="checkbox"/>	<input type="text" value="M.S."/>	<input type="checkbox"/>
▼▲	Generate Status	<input checked="" type="checkbox"/>	<input type="text" value="B.S."/>	<input type="checkbox"/>
▼▲	Status	<input checked="" type="checkbox"/>	<input type="text" value="Visit Status"/>	<input type="checkbox"/>
▼▲	Delete Icon	<input checked="" type="checkbox"/>	<input type="text" value="Delete"/>	<input type="checkbox"/>
▼▲	Request Edit Link	<input checked="" type="checkbox"/>	<input type="text" value="Scheduled Visit"/>	<input type="checkbox"/>
▼▲	Calendar Link	<input checked="" type="checkbox"/>	<input type="text" value="Client Calendar"/>	<input type="checkbox"/>
▼▲	Override Hours	<input checked="" type="checkbox"/>	<input type="text" value="Override Hours"/>	<input type="checkbox"/>
▼▲	Update Visit	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
▼▲	Address Valid	<input checked="" type="checkbox"/>	<input type="text" value="Address Valid"/>	<input type="checkbox"/>

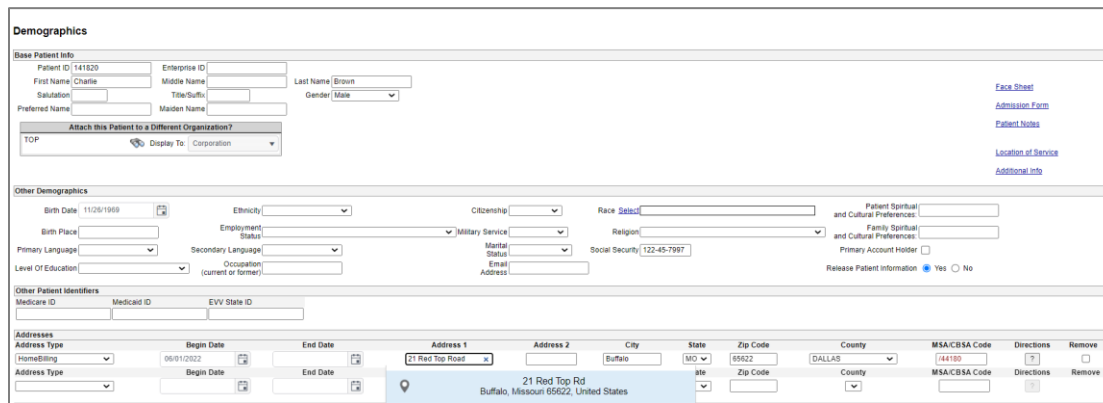
- Select Address Valid by selecting the check mark in the Include Column
- Add the Address Valid Label
- Using the up arrow – move the Address Valid to the next column included

Address Validation

Address Validation can be completed in the Visit Editor as part of the visit process or in demographics as part of the referral/intake process.

Demographic Address Validation

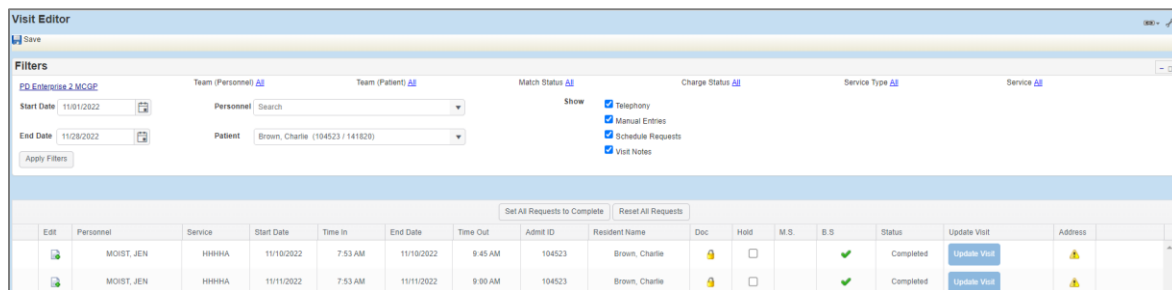
Census>Patient Info>Demographics



- Address Type: HomeBilling
- Begin Date: Must be on or before the admission date of the patient.
- Address 1: Begin typing the address and the address service will give options for a validated address. Choosing the valid address from the list will save the validated address.
- Fill in City, State, Zip, County
- Select Submit

Visit Editor Address Validation




Scheduling>Visit Editor>Open Visit Editor



Edit	Personnel	Service	Start Date	Time In	End Date	Time Out	Admit ID	Resident Name	Doc	Hold	M.S.	B.S.	Status	Update Visit	Address
	MOIST, JEN	HHHA	11/10/2022	7:53 AM	11/10/2022	9:45 AM	104523	Brown, Charlie		<input type="checkbox"/>		<input checked="" type="checkbox"/>	Completed	Update Visit	
	MOIST, JEN	HHHA	11/11/2022	7:53 AM	11/11/2022	9:00 AM	104523	Brown, Charlie		<input type="checkbox"/>		<input checked="" type="checkbox"/>	Completed	Update Visit	

- Select the start/end dates for visit timeframe

- Select patient (optional)
- Apply Filters
- Select Submit


Address Validation Icon	Address Validation Status
	Address not Validated
	Address is Validated
	Address is not Valid

Location Capture on Visit Documentation

To utilize GPS capture functionality, a table or phone device must be used which natively supports location capture.

When starting a visit, the visit date and Visit Start time will be captured along with the location using the device's GPS capture functionality. The clinician will see a Clock In & Create button rather than the create visit previously used.

Skilled Nursing Visit Note JSON Quick Start ✕

Visit Date: 

Visit Start Time:

Billing Code:

Scheduled Visits:

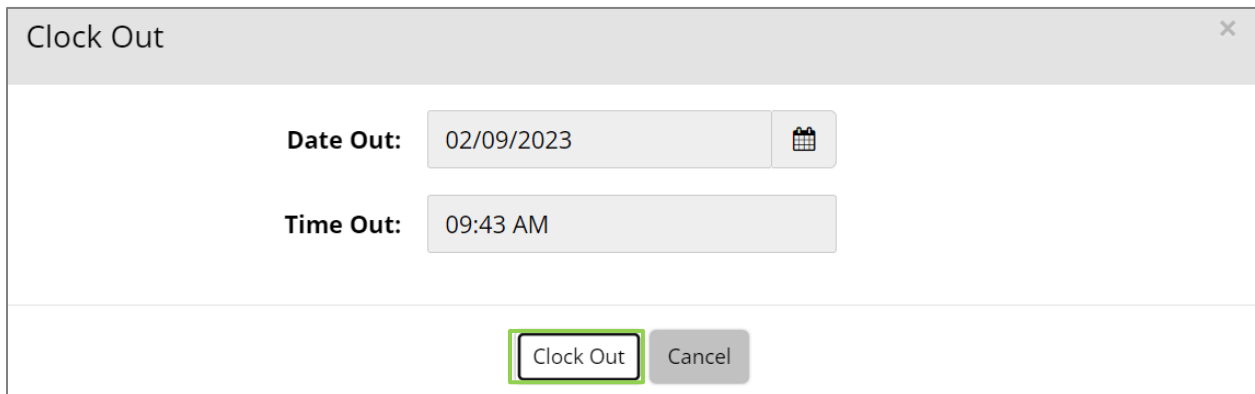
08:00 AM HHSNRoutine (RN/RNH/LVN/RNPD/HLVN)

After opening the form to document the visit, a new button will appear on the bottom of the page to allow the clinician to clock out.



The Signer confirms that the Duration and Services documented on this Visit are accurate.
 Signature:
 Person Signing:
 Caregiver Signature: This form has not been electronically signed by you.

When leaving the patient home, **the clinician must use the Clock Out Button to clock out from the visit and capture the GPS location.** This will allow the clinician to come back in and complete the documentation if it was not completed during the visit.

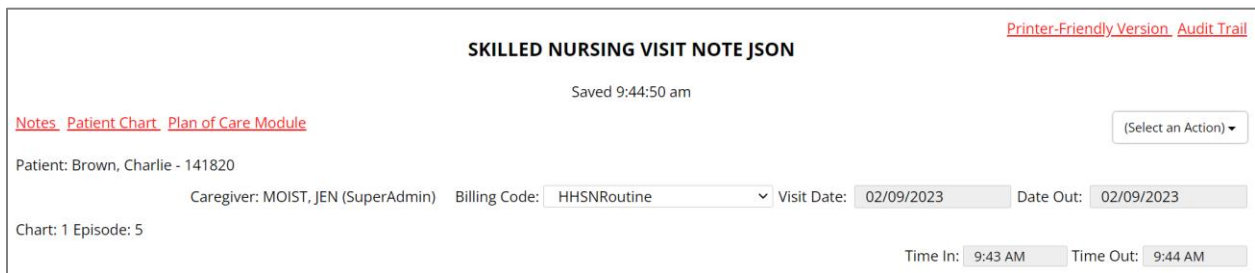


Clock Out [X]

Date Out: 02/09/2023 [Calendar icon]

Time Out: 09:43 AM

Clock out will fill in the date / time out at the top of the visit form. Time in and time out will not be editable, changes to those items will need to be made by a super admin.



[Printer-Friendly Version](#) [Audit Trail](#)

SKILLED NURSING VISIT NOTE JSON

Saved 9:44:50 am

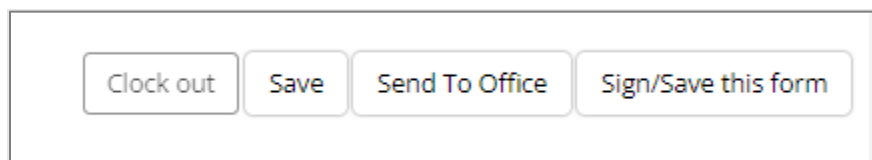
[Notes](#) [Patient Chart](#) [Plan of Care Module](#) (Select an Action) ▾

Patient: Brown, Charlie - 141820

Caregiver: MOIST, JEN (SuperAdmin) Billing Code: HHSNRoutine Visit Date: 02/09/2023 Date Out: 02/09/2023

Chart: 1 Episode: 5 Time In: 9:43 AM Time Out: 9:44 AM

After clock out is complete, the remaining actions will be available to complete the visit and will allow the user to complete any documentation. This form will remain in a pending status until the clinician selects the button to send the form to the office.



Clock in / Clock Out will appear across the organization on forms when capture location is activated. The form will show the type of clock in / clock out if the organization is reporting EVV data.

Time In: <input type="text" value="10:59 AM"/>	Time Out: <input type="text" value="11:43 AM"/>
EVV Clock In Type: Mobile EVV Clock Out Type: Mobile	

The form will not show the type of clock in / clock out if the organization is not reporting EVV data.

Time In: <input type="text" value="11:07 AM"/>	Time Out: <input type="text" value="12:05 PM"/>
--	---

Visit Correction

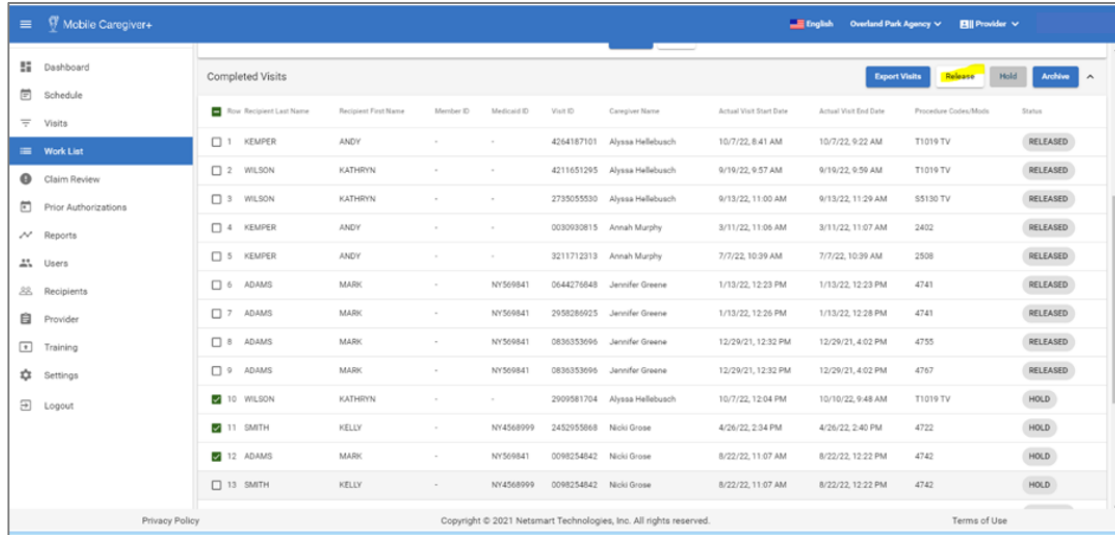
EVV visits can be updated using the [Visit Correction Process](#). EVV visits cannot be removed and regenerated, once removed the batch will need to be deleted and visits pulled into a new batch using Generate Visit Charges.

Visit Submission Process

Releasing and Submitting Visits

MCG+ Admin Portal>Worklist

The user will review and select the visits to be released by selecting the check mark next to the visits and then select Release on the top of the window.



Row	Recipient Last Name	Recipient First Name	Member ID	Medicaid ID	Visit ID	Caregiver Name	Actual Visit Start Date	Actual Visit End Date	Procedure Codes/Units	Status
1	KEMPER	ANDY	-	-	4204187101	Alyssa Hellebusch	10/7/22, 8:41 AM	10/7/22, 9:22 AM	T1019 TV	RELEASED
2	WILSON	KATHRYN	-	-	4211651205	Alyssa Hellebusch	9/19/22, 9:57 AM	9/19/22, 9:59 AM	T1019 TV	RELEASED
3	WILSON	KATHRYN	-	-	2735055530	Alyssa Hellebusch	9/13/22, 11:00 AM	9/13/22, 11:29 AM	55130 TV	RELEASED
4	KEMPER	ANDY	-	-	0030930815	Annah Murphy	3/11/22, 11:06 AM	3/11/22, 11:07 AM	2402	RELEASED
5	KEMPER	ANDY	-	-	3211712313	Annah Murphy	7/7/22, 10:39 AM	7/7/22, 10:39 AM	2508	RELEASED
6	ADAMS	MARK	-	NY569841	0644276048	Jennifer Greene	1/13/22, 12:23 PM	1/13/22, 12:23 PM	4741	RELEASED
7	ADAMS	MARK	-	NY569841	2958286925	Jennifer Greene	1/13/22, 12:26 PM	1/13/22, 12:28 PM	4741	RELEASED
8	ADAMS	MARK	-	NY569841	083653696	Jennifer Greene	12/29/21, 12:32 PM	12/29/21, 4:02 PM	4755	RELEASED
9	ADAMS	MARK	-	NY569841	083653696	Jennifer Greene	12/29/21, 12:32 PM	12/29/21, 4:02 PM	4767	RELEASED
10	WILSON	KATHRYN	-	-	2909581704	Alyssa Hellebusch	10/7/22, 12:04 PM	10/10/22, 9:48 AM	T1019 TV	HOLD
11	SMITH	KELLY	-	NY4568999	2452955668	Niki Grose	4/26/22, 2:34 PM	4/26/22, 2:40 PM	4722	HOLD
12	ADAMS	MARK	-	NY569841	0098254842	Niki Grose	8/22/22, 11:07 AM	8/22/22, 12:22 PM	4742	HOLD
13	SMITH	KELLY	-	NY4568999	0098254842	Niki Grose	8/22/22, 11:07 AM	8/22/22, 12:22 PM	4742	HOLD

Once submitted to the state aggregator, the visit can either be Accepted or Rejected. myUnity will check if the visit has been Accepted or not before it can be billed, the charge will remain in “Unverified” status until it has been Accepted. Once Verified, it can be billed.

Rejected Visits

If a visit is rejected by the aggregator the reason for rejection will be available through either the Mobile Caregiver+ admin portal or through the alerts in myUnity.

When visits are rejected, the reasons for rejection will be accessible by selecting the ‘!’ icon in the MCG+ Provider Portal Worklist.

Clinical>Homepage>Alerts

Errors are visible on the myUnity Clinical Alerts service by selecting the bell icon on the top of the home page. Once the alerts have been read by the user, the number of alerts on the bell will be reduced.

Feature	Message	Patient	Personnel	Date/Time	Action
EVV Client	EVV Client: Required field:PhoneNumbers.Number Invalid format: ""	Chernoglo, PDMCG		10/19/2022 9:07:03 am	✓
EVV Client	EVV Client: Required field:PhoneNumbers	Brown, Charlie		10/12/2022 11:22:00 am	✓
EVV Client	EVV Client: Required field:PhoneNumbers	Brown, Charlie		10/03/2022 9:26:29 am	✓
EVV Client	EVV Client: Missing Medicare Number ; Missing Medicaid Number	Berry2, Test		10/03/2022 7:08:03 am	✓
EVV Client	EVV Client: Missing Medicaid Number ; Missing Social Security Number	Bert1, Test		10/03/2022 7:00:51 am	✓
EVV Visit Submission Status	EVV Visit Submission Status: HHA Visit Note 12/07/2021 08:00 AM - 12/07/2021 08:15 AM Missing Patient Signature	Bekah, Test		09/30/2022 12:28:25 pm	✓
EVV Client	EVV Client: Able to process patient - Harold, Farmer	Berry1, Test		09/30/2022 10:16:36 am	✓

- Rejected visits must be corrected and resubmitted to the state aggregator. Any rejections related to visit, recipient, or caregiver data should be corrected in myUnity Enterprise, so the data is kept in sync.
- Correction to visit data will be performed through the Visit Correction Process in myUnity.
- If the visit was rejected due to missing a reason code, Provider Admins will add reason codes for the associated visit on the Worklist screen in the Mobile Caregiver+ Provider Portal.

Patient Required Fields

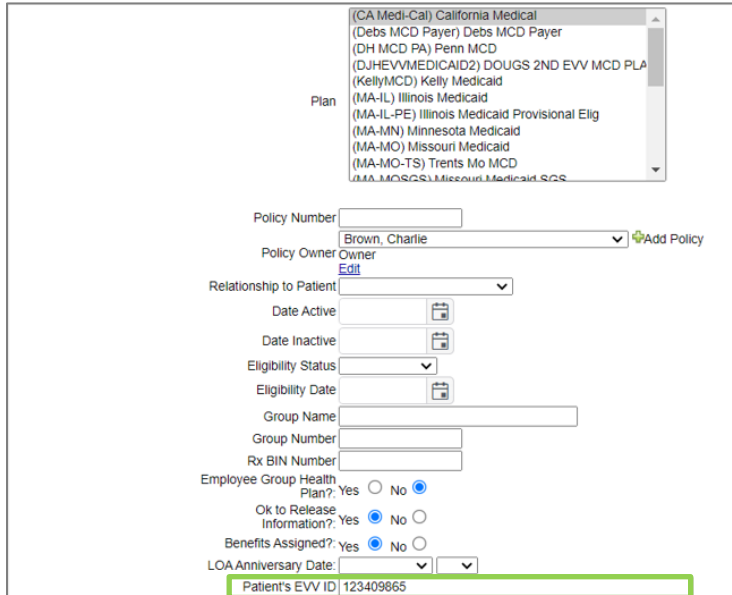
Patient Demographics:

- Patient must have an active address
- Patient must have an active phone number
- Patient Medicaid ID & EVV State ID (if required) must be present in Other Patient Modifiers
- Patient must have an admission attached to an Org Facility level with an established EVV vendor.
- Patient must have a date of birth
- Patient must have a location of service
- Patient must have a diagnosis code
- Patient must have an insurance plan in which the 'Include in EVV Reporting Mandate' is selected as Yes.

California Setup

Patient EVV ID

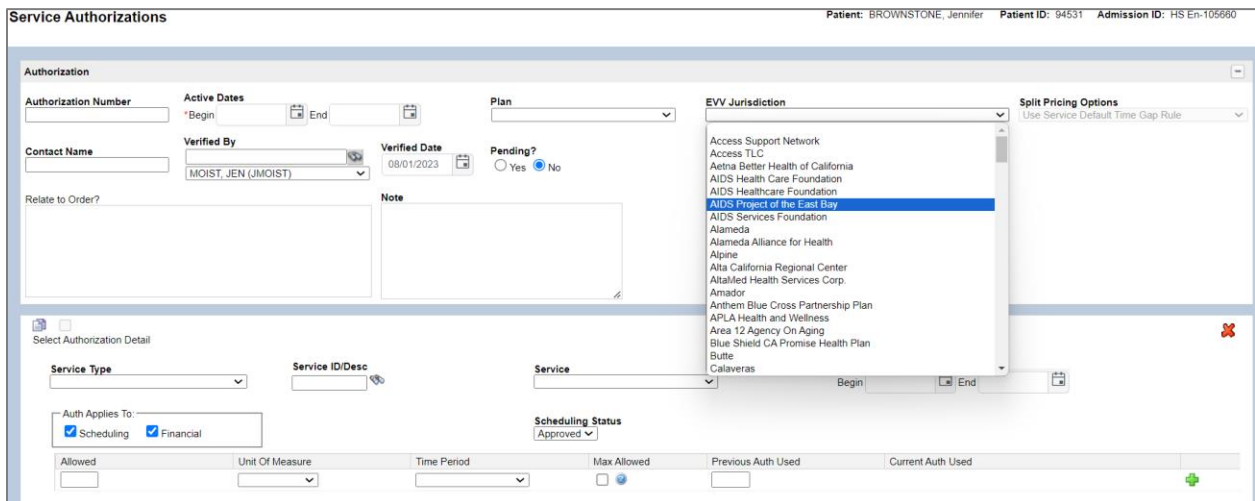
Census>Payer/Bill Info>Add Funding Coverage



- California will provide the patient's EVV id to be added to the funding coverage.

EVV Jurisdiction

Census>Payer/Bill Info>Service Authorizations



- California patients will have an EVV jurisdiction that will be assigned based on their location. The EVV jurisdiction is entered as part of the service authorization. It will be chosen from the EVV jurisdiction drop down list.

Authorization

Service Authorizations Resident: BROWNSTONE, Jennifer Resident ID: 94531 Admission ID: TwmOK-102555

Authorization

Authorization Number: 98169425
 Active Dates: Begin 07/01/2023 End 09/30/2023
 Plan: EVV Jurisdiction / Alta California Regional Center
 Split Pricing Options: Use Service Default Time Gap Rule

Contact Name:
 Verified By: QAMASTER, LPN, RN QAMASTER
 Verified Date: 08/07/2023
 Pending?: Yes No

Relate to Order?:
 Note:

Select Authorization Detail

Service Type: Skilled Nursing
 Service ID/Desc:
 Service: HH RN Routine
 Active Dates: Begin 07/01/2023 End 09/30/2023

Auth Applies To: Scheduling Financial
 Scheduling Status: Approved
 Scheduling Reason: Authorization Parameters

Allowed	Unit Of Measure	Time Period	Max. Allowed	Previous Auth Used	Current Auth Used
3	Visit(s)	Per Week	<input type="checkbox"/>		

California requires the Service to be specified in the authorization. The authorization can not be at the service type level but must include the specific service to be provided.

Arizona Setup

EVV Contingency Security Setup

Setup>Security>Roles>Menu Access Privileges

Menu Access Privileges

Roles to Update: HC: Super User

Select Role(s):

- HC: Coder
- HC: Intake / Referral Nurse
- HC: Scheduler
- HC: Super User**
- HH: Billing Specialist
- HH: Clerical Associate
- HH: Clinical Manager
- HH: Mobile View MSW

Service Module:

- Home
- Census
- Scheduling
- Clinical
- Financial
- Personnel
- Setup
- Point of Care

Service Area:

- Patient
- Organization
- Actions
- Reports

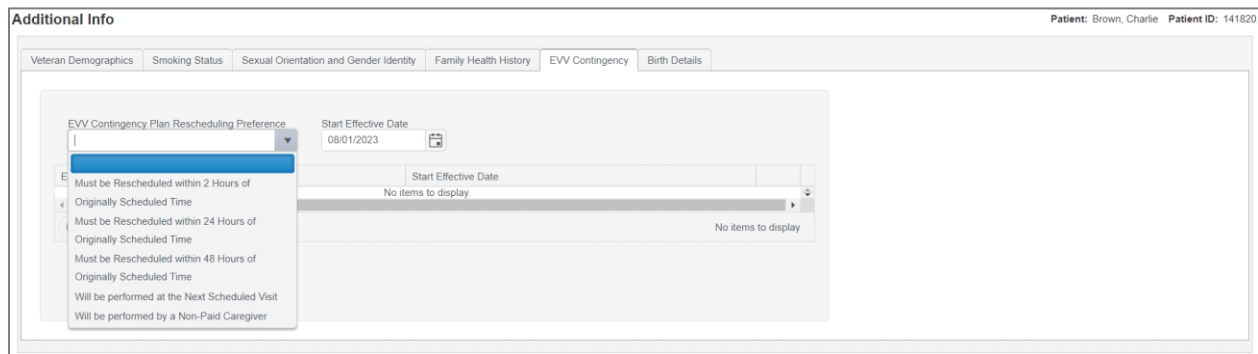
Service	View	Update	Add	Remove
Patient Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patient Notifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Patient User-Defined Data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting of Disclosure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Admission User-Defined Data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Affiliations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attachments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Birth Details	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consent to Release Medical Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demographics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency Preparedness Identifiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EVV Contingency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Select the Role to be updated

- Service Module: Select Census
- Service Area: Select Patient
- Scroll to Patient Info
 - EVV Contingency: Select View and Update
- Scroll to the bottom of the screen and select Submit

EVV Contingency

Census>Patient Info>Related Items>EVV Contingency



Additional Info Patient: Brown, Charlie Patient ID: 141820

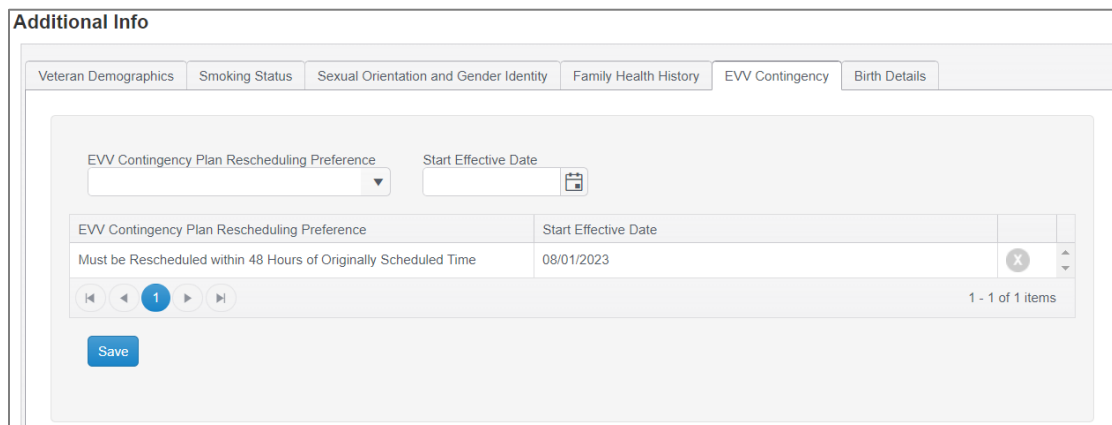
Veteran Demographics Smoking Status Sexual Orientation and Gender Identity Family Health History **EVV Contingency** Birth Details

EVV Contingency Plan Rescheduling Preference: [Dropdown menu open with options: Must be Rescheduled within 2 Hours of Originally Scheduled Time, Must be Rescheduled within 24 Hours of Originally Scheduled Time, Must be Rescheduled within 48 Hours of Originally Scheduled Time, Will be performed at the Next Scheduled Visit, Will be performed by a Non-Paid Caregiver]

Start Effective Date: 08/01/2023

Table: EVV Contingency Plan Rescheduling Preference | Start Effective Date | No items to display

Arizona requires a patient contingency plan be provided provided and reviewed with the patient annually and documentation provided. Select the appropriate contingency plan rescheduling preference with the effective date and select save.



Additional Info

Veteran Demographics Smoking Status Sexual Orientation and Gender Identity Family Health History **EVV Contingency** Birth Details

EVV Contingency Plan Rescheduling Preference: [Dropdown menu closed]

Start Effective Date: 08/01/2023

EVV Contingency Plan Rescheduling Preference	Start Effective Date
Must be Rescheduled within 48 Hours of Originally Scheduled Time	08/01/2023

1 - 1 of 1 items

Save

Patient Designee

Census>Patient Info>Related Parties

* First Name Suzanne	Middle Name	Search Results The person may already exist. Select Brown, Suzanne 101 1st St, PO BOX Brown, Suzanne (142) 53-9571 (CP) Brown, Suzanne 4323 Infinity Road, S																
* Last Name Brown	Date of Birth 06/07/2022																	
SSN 654219876	Email Suzanne.Brown@email.com																	
Bereavement Priority Level																		
Comment																		
<input checked="" type="radio"/> Patient's Designee <input type="radio"/> Yes <input type="radio"/> No																		
Phones																		
Phone Type	Phone Number	Active																
Home Phone	(43) 866-9213	01/01/2015																
Addresses																		
Address Type	Address 1	Address 2																
HomeBilling	101 1st St	PO BOX 42																
	City	State																
	New York	NEW YORK																
	Zip Code	10025																
	Active	01/01/2015																
<table border="1"> <thead> <tr> <th>* Relationship Type</th> <th>Person Type</th> </tr> </thead> <tbody> <tr> <td>Care Plan Consult</td> <td>Accountant</td> </tr> <tr> <td>Care Responsibility</td> <td>Activity Director</td> </tr> <tr> <td>Child</td> <td>Attorney</td> </tr> <tr> <td>Conservator</td> <td>Church Member</td> </tr> <tr> <td>Cousin</td> <td>Driver</td> </tr> <tr> <td>Daughter</td> <td>Father</td> </tr> <tr> <td>Daughter-in-Law</td> <td>Geriatric Manager</td> </tr> </tbody> </table>			* Relationship Type	Person Type	Care Plan Consult	Accountant	Care Responsibility	Activity Director	Child	Attorney	Conservator	Church Member	Cousin	Driver	Daughter	Father	Daughter-in-Law	Geriatric Manager
* Relationship Type	Person Type																	
Care Plan Consult	Accountant																	
Care Responsibility	Activity Director																	
Child	Attorney																	
Conservator	Church Member																	
Cousin	Driver																	
Daughter	Father																	
Daughter-in-Law	Geriatric Manager																	

Arizona requires the patient designee be sent as part of the patient EVV information. Designee should be set on the responsible part.

Patient Designee Signature

Setup – Netsmart to complete

Clinical>Forms Properties

<input checked="" type="checkbox"/> 20230705	NTST	OASIS-E	ICD10	Skilled Nurse Visit Note
Additional Properties				
Default Import Version:	<input checked="" type="radio"/> Yes <input type="radio"/> No			
Is Frequency on Forms:	<input type="radio"/> Yes <input type="radio"/> No <input type="button" value="Version 2"/>			
CPT widget Version:	Version 1			
Is Available Offline:	<input checked="" type="radio"/> Yes <input type="radio"/> No			
Is MyUnity Order Form:	<input type="radio"/> Yes <input type="radio"/> No			
Use Skip:	<input type="radio"/> Yes <input type="radio"/> No			
Enable Dictation Mode:	<input type="radio"/> Yes <input type="radio"/> No			
Enable Auto-Map POC Widgets on Form Create:	<input type="radio"/> Yes <input type="radio"/> No			
EVV Care Plan User Type:	(Select EVV Care Plan User Type)			
SSO Medication Profile:	<input type="radio"/> Yes <input type="radio"/> No			
Timecard:				
Show Billing Code:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Manual			
Free Hand Signature Type:	<input type="radio"/> Auto <input type="radio"/> Manual <input checked="" type="radio"/> None			
Free Hand Signature Label:				
Free Hand Signature Location:	<input type="radio"/> First <input type="radio"/> Last <input checked="" type="radio"/> All			
Display Freehand Signature Attestation:	<input checked="" type="radio"/> Yes <input type="radio"/> No			
Show Signer Type:	<input checked="" type="radio"/> Yes <input type="radio"/> No			

Forms must be set with the Freehand Signature Attestation set and Show Signer type set to yes. Repeat for all forms capturing signature.

Designee Signature Capture

The Signer confirms that the Duration and Services documented on this Visit are accurate.

Signature:

Click to Sign

Person Signing:

Client Designee ▼

Those forms that have been updated will allow for the signature to be captured and the person signing will allow it to be set as the patient or the patient designee.

Task Refusal

Assigned Tasks				
Performed	Client Refused	Task	Notes	Comments
Vital Signs				
<input type="checkbox"/>	<input type="checkbox"/>	Blood pressure		
Grooming				
<input type="checkbox"/>	<input type="checkbox"/>	Skin care		
Cleaning				
<input type="checkbox"/>	<input type="checkbox"/>	Trash		
Medications				
<input type="checkbox"/>	<input type="checkbox"/>	Medication Management		

Within the MCG+ application the caregiver will have the option to mark the task as refused by the patient. Arizona is requiring this to be chosen if the patient does refuse a service or task.