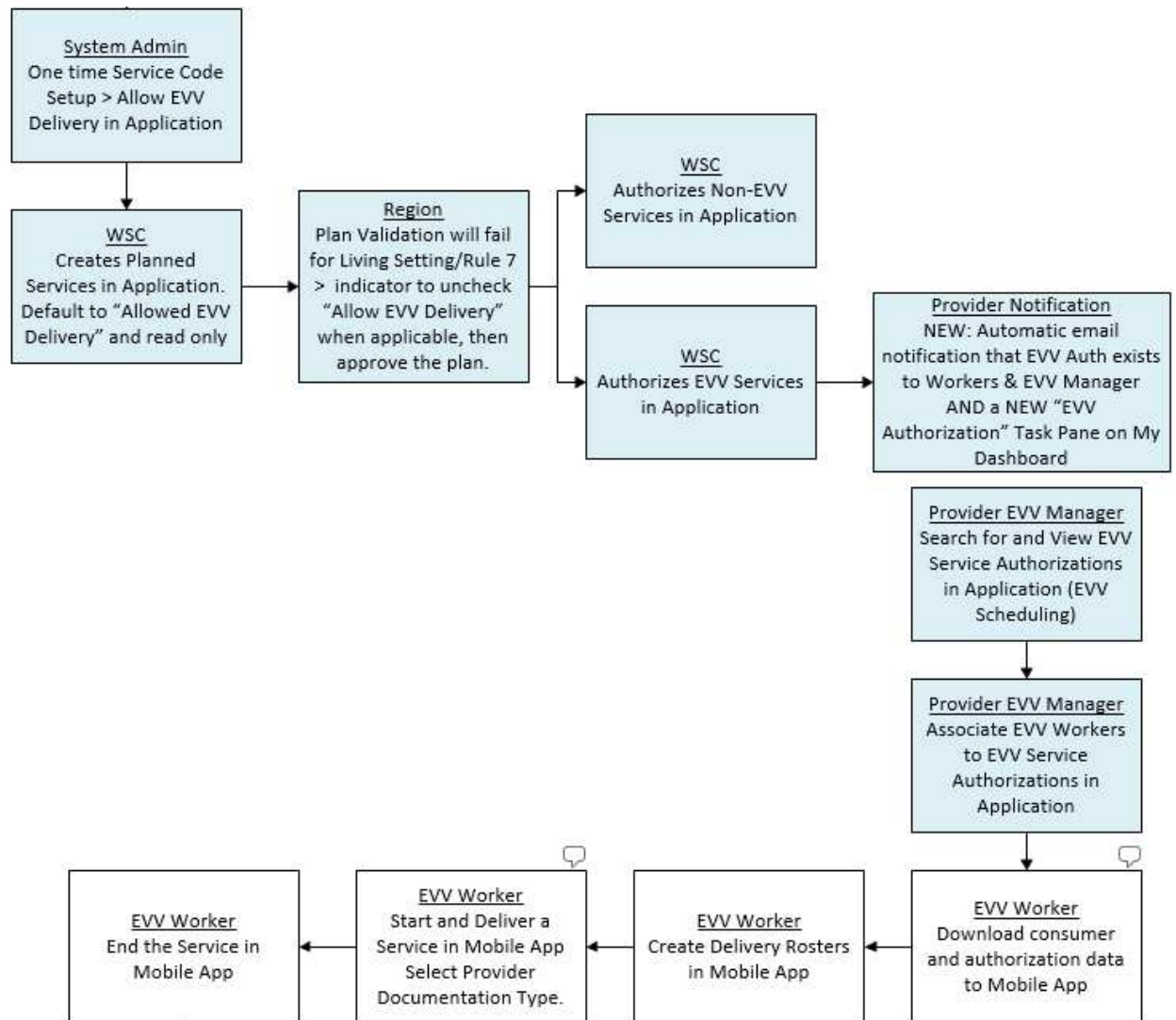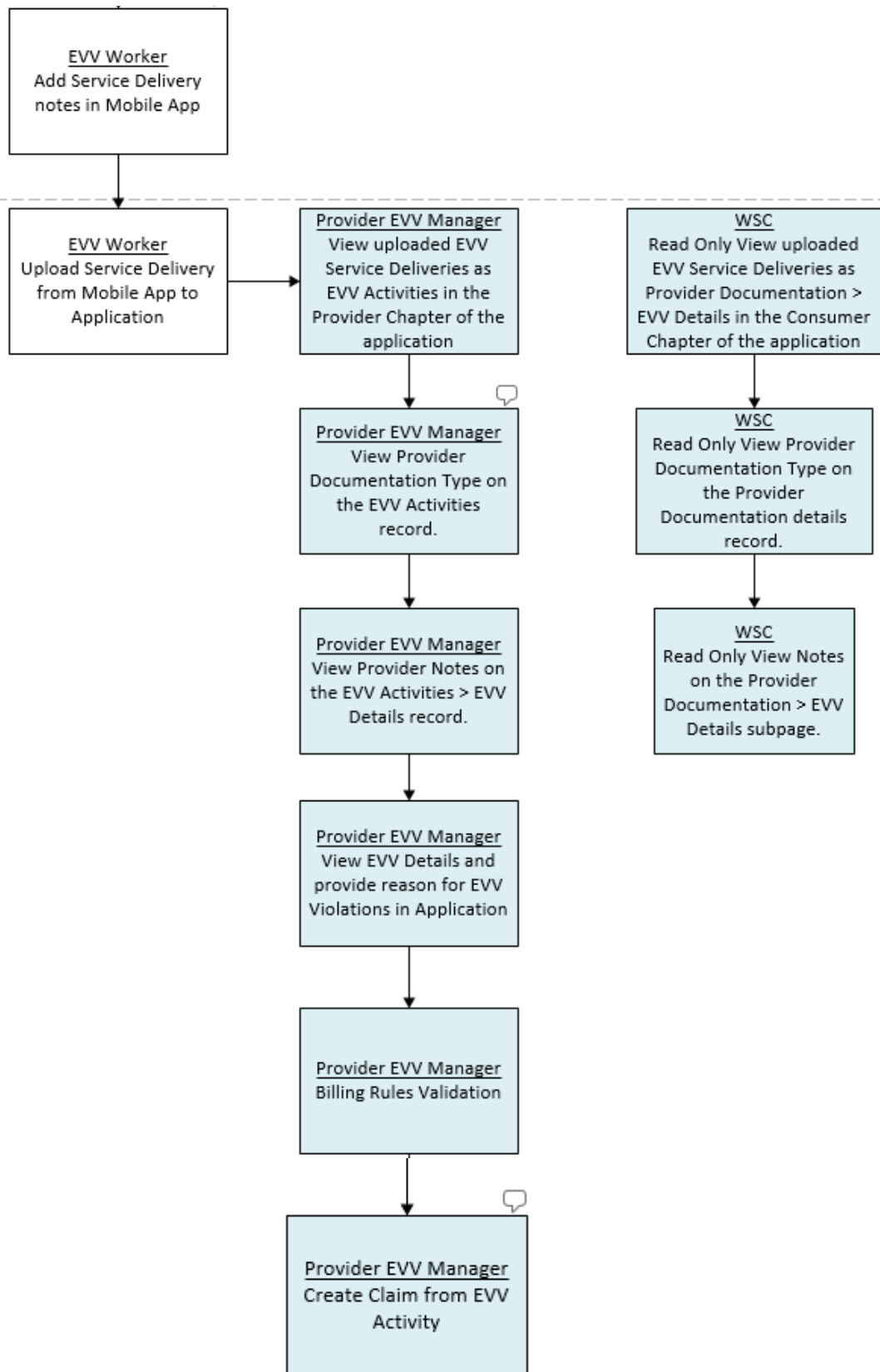# Chapter 4 | Electronic Visit Verification (EVV)

Provider EVV Managers will assign EVV workers to deliver EVV services to specific consumers. The EVV worker will use the Mobile Site to record each service delivery. The start date, time, and GPS location will be recorded at the start and stop of each delivery. Completed deliveries will be uploaded to the iConnect application where they will be recorded as EVV Activities. Provider EVV Managers will review the uploaded Activities, and where appropriate, justify any violations before submitting the claim which will be processed in the normal manner.

```
┌─────────────────┐
│   EVV Worker    │
│ Add Service     │
│ Delivery        │
│ notes in        │
│ Mobile App      │
└────────┬────────┘
         │
─ ─ ─ ─ ─│─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─
         ▼
┌─────────────────┐     ┌──────────────────────┐     ┌──────────────────────┐
│   EVV Worker    │     │ Provider EVV Manager  │     │        WSC           │
│ Upload Service  │────▶│ View uploaded EVV     │     │ Read Only View       │
│ Delivery from   │     │ Service Deliveries as │     │ uploaded EVV Service │
│ Mobile App to   │     │ EVV Activities in the │     │ Deliveries as        │
│ Application     │     │ Provider Chapter of   │     │ Provider Documentation│
└─────────────────┘     │ the application       │     │ > EVV Details in the │
                        └──────────┬───────────┘     │ Consumer Chapter of  │
                                   │                  │ the application       │
                                   ▼                  └──────────┬───────────┘
                        ┌──────────────────────┐                 ▼
                        │ Provider EVV Manager  │     ┌──────────────────────┐
                        │ View Provider         │     │        WSC           │
                        │ Documentation Type on │     │ Read Only View        │
                        │ the EVV Activities    │     │ Provider Documentation│
                        │ record.               │     │ Type on the Provider  │
                        └──────────┬───────────┘     │ Documentation details │
                                   │                  │ record.               │
                                   ▼                  └──────────┬───────────┘
                        ┌──────────────────────┐                 ▼
                        │ Provider EVV Manager  │     ┌──────────────────────┐
                        │ View Provider Notes   │     │        WSC           │
                        │ on the EVV Activities │     │ Read Only View Notes  │
                        │ > EVV Details record. │     │ on the Provider       │
                        └──────────┬───────────┘     │ Documentation > EVV   │
                                   │                  │ Details subpage.      │
                                   ▼                  └──────────────────────┘
                        ┌──────────────────────┐
                        │ Provider EVV Manager  │
                        │ View EVV Details and  │
                        │ provide reason for    │
                        │ EVV Violations in     │
                        │ Application           │
                        └──────────┬───────────┘
                                   │
                                   ▼
                        ┌──────────────────────┐
                        │ Provider EVV Manager  │
                        │ Billing Rules         │
                        │ Validation            │
                        └──────────┬───────────┘
                                   │
                                   ▼
                        ┌──────────────────────┐
                        │ Provider EVV Manager  │
                        │ Create Claim from EVV │
                        │ Activity              │
                        └──────────────────────┘
```

Users

Users typically include a program supervisor and their staff at the state/agency, a Provider EVV Manager, and a user that reviews EVV Activities and bills them.

1. State users ("APD")
   - State users primarily interact with EVV-specific functionality in the context of granting exceptions to EVV service deliveries that violate pre-determined criteria (e.g., activity was delivered in an unapproved location) and during QA/QIO activities.

2. Provider EVV Managers ("Providers")
   - Provider staff work within iConnect and are responsible for
     - Scheduling and/or assigning their EVV workers to deliver EVV services to their consumers
     - Reviewing uploaded/delivered EVV services
     - Justifying/explaining services that violate pre-determined criteria
     - Submitting EVV services that do not have violations (or have justified violations) for payment (convert to claims)
   - Some providers may opt to split these responsibilities among several of their staff

3. Provider EVV Workers ("Workers")
   - EVV workers are the individual workers at each provider organization that are responsible for going to the consumer's home and rendering the service. They work exclusively in the Mobile Site and are responsible for:
     - Starting a service delivery
     - Delivering a service
     - Ending the service delivery
     - Adding delivery notes
     - Uploading the completed service delivery to Harmony

EVV Validation Rules

Standard EVV Validation Rules, includes Violations and Billing Rules. Any Violation rules that fail will display in the EVV Details page. Billing rules that fail are visible on Billing Issue report that can be executed from the EVV Activities List, EVV Activities Details page and in the Consumer Activity Details page.

Violations Rules

Rule Name: **Allow EVV Delivery**
Rule Number: 1
Violation Type/Subtype: EVV Service/Not an EVV Service

Failed Rule Description: This service cannot be delivered via EVV. This may be because the service cannot ever be delivered via EVV, the rendering provider is not authorized to deliver the service via EVV, or the consumer is not authorized to receive the service via EVV.

Note: If this service is an EVV service, and the rendering provider is authorized to deliver EVV services, notify the iConnect Support Desk.

Rule Name: **Manual Entry Requires Justification**

Rule Number: 2

Violation Type/Subtype: EVV/Manual Entry

Failed Rule Description: The service delivery was not recorded using the Mobile Site.

Rule Name: **Service Requires Note**

Rule Number: 3

Violation Type/Subtype: Note Required/Service

Failed Rule Description: This service requires a delivery note.

Note: the EVV Within Mobile Site a warning message will display on the Current Deliveries list informing the user that a note is required for the service.

Rule Name: **Other Location Requires Note**

Rule Number: 4

Violation Type/Subtype: Note Required/Other Location

Failed Rule Description: Non-approved delivery locations require a note.

Rule Name: **Enforce Geolocation – No GPS**

Rule Number: 5

Violation Type/Subtype: Geolocation/Missing GPS

Failed Rule Description: GPS coordinates could not be obtained for address at which the service delivery was started and/or ended.

Rule Name: **Enforce Geolocation – Start**

Rule Number: 6

Violation Type/Subtype: Geolocation/Start Address

Failed Rule Description: The address at which the service delivery was started was too far away from the stated delivery address.

Rule Name: **Enforce Geolocation – Start Address is Blank**

Rule Number   6a

Violation Type/Subtype: Geolocation/Start Address

Failed Rule Description: The address at which the service delivery is blank.

Rule Name: **Enforce Geolocation – End**

Rule Number: 7

Violation Type/Subtype: Geolocation/End Address

Failed Rule Description: The address at which the service delivery was ended was too far away from the stated delivery address.

Rule Name: **Enforce Geolocation – End Address is blank**

Rule Number: 7a

Violation Type/Subtype: Geolocation/End Address

Failed Rule Description: The address at which the service delivery was ended is blank.

Billing Rules

Rule Name: **Primary Diagnosis Required**

Rule Number: 8

Failed Rule Description: A primary diagnosis is required to bill.

Rule Name: **Place of Service Required**

Rule Number: 9

Failed Rule Description: A place of service is required to bill.

Rule Name: **Consumer Gender Required**

Rule Number: 10

Failed Rule Description: The consumer must have a gender in order to bill.

Rule Name: **Consumer DOB Required**

Rule Number: 11

Failed Rule Description: The consumer must have a DOB and the DOB must not be in the future in order to bill.

Rule Name: **Consumer Address Required**

Rule Number: 12

Failed Rule Description: The consumer must have a complete address (street, city, state, zip code) in order to bill.

Rule Name: **Consumer Medicaid ID Required**

Rule Number: 13

Failed Rule Description: The consumer must have a Medicaid ID in order to bill. If the consumer does not have/need a Medicaid ID to receive the service, a placeholder/dummy value will still need to be populated. Consult your system administrator or program manager for the appropriate value to use.

Rule Name: **Provider Phone Required**

Rule Number: 14

Failed Rule Description: The provider must have a phone number in order to bill.

Rule Name: **Provider Mailing Address Required**

Rule Number: 15

Failed Rule Description: The provider must have a mailing address in order to bill.

Rule Name: **Provider EIN Required**

Rule Number: 16

Failed Rule Description: The provider must have an EIN / Tax ID in order to bill.

Rule Name: **Provider NPI Required**

Rule Number: 17

Failed Rule Description: The provide must have an NPI in the Provider > Edit Provider > NPI field in order to bill. If the provider does not have/need an NPI to deliver the service, you will still need to put a populate the field. Consult your system administrator or program manager for the appropriate value to use.

Rule Name: **Unresolved Violations**

Rule Number: 18

Failed Rule Description: Unresolved violations are associated with this service prevent this service from being Billed.

Rule Name: **Missing Submittal Folder**

Rule Number: 19

Failed Rule Description: The application is not currently configured to process claims. Please ask your system or program administrator to contact Customer Support.

Rule Name: **Missing Sender ID for Rendering Provider**

Rule Number: 20

Failed Rule Description: The rendering provider on the activity is not configured to submit claims. Please contact your system or program administrator and ask them to setup a Sender ID in the provider's Provider ID Numbers tab.

Rule Name: **No Issues - Set Activity to Billable**

Rule Number: 100

Rule Description: If all rules are passed, then the "EVV Billable?" will be set to "Yes" TRUE/checked) so that the user can convert the activity to a claim.

Authorize EVV Services (APD iConnect Application)

1. WSC's work with consumers to plan and authorize services that can meet the consumer's needs using the planned services, plan validation and authorization functionality in iConnect. This content is covered in the Case Management Training Manual.

2. If a service requires EVV delivery per APD business rules and CMS requirements, the Allow EVV Delivery field will be visible and checked on the Planned Services page. After the plan is approved and passes validation, the authorization is created and will be visible in the Consumer > Auths and Provider > EVV Activities tabs.

apd iConnect   John Sheppard | **Planned Service**
Last Updated by jbuck
at 9/25/2019 12:04:17 PM

File

Non-Taxable	☐
Planned Service Status	▼

Region/State Review Comments
(REQUIRED)

On 9/25/2019 at 11:46 AM, Jennifer Buck wrote: region denies this service

New Text

Append Text to Note

Corresponding Auth No.	
Allow EVV Delivery	☑

3. Regional staff will have permissions to uncheck the Allow EVV Delivery field, to force a service delivery to be delivered via traditional means rather than EVV for certain living settings.

Searching for and Viewing EVV Service Authorizations (Service Provider record in the APD iConnect Application)

The provider will have select the staff that are responsible for managing the scheduling of EVV services for their organization. The EVV Scheduling tab presents a view of all consumers with an authorized EVV service. The user must also be a worker for the authorized provider to see any records on this tab. The user can use filters to quickly find and see individual or groups of consumers that meet specified criteria and can assign/reassign EVV workers to authorizations.

1. Navigate to the Provider record and click on the EVV Scheduling tab.

2. Specify one or more parameters in the Search filter section at the top of the grid. A likely filter will be Primary EVV Worker Equal to Blank.

3. Click "Search" to apply the filters. The screen will refresh to show only those EVV authorizations that meet the search criteria.

Save a Search Filter:

a. <mark>The user should save his/her search filters as default</mark> so each time he/she views the EVV Scheduling tab, the default filters will be in place and will not have to be set each time.

b. Once the Search filters are selected and the search executed, select Save As.

c. Enter a Name of the Search Filter and check Set as Default to set this as the default search filter for the user's EVV Activities tab. Leave this unchecked if this should be a saved search filter but NOT the default search filter. Click Save.

d. The next time the EVV Scheduling tab is opened, the default search filters will be in place and the user just has to select "Search"

Edit a Saved Search Filter:

a. The user can made changes to a previously saved Search filter. Select the Name of the saved search filter from the dropdown that needs to be changed.

b. Make the changes and then select Save As.

c. You can save the edited filter with a new name or enter the same name as the original saved filter and make sure the "If Filter Name Exists, Overwrite it" is checked.

d. Click Save.

Delete a Saved Search Filter:

    a. The user can delete a previously saved Search filter. Select the Name of the saved search filter from the dropdown that needs to be deleted. Select the Delete tab. Click OK to the Notification window. The search filter is deleted.
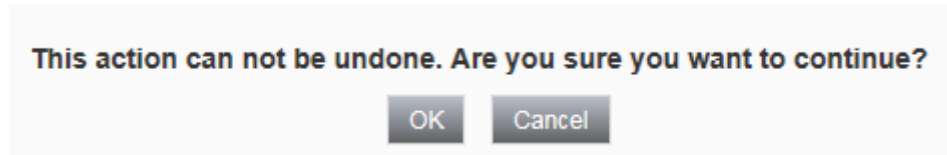
    b. Click on an authorization from the search results grid.

    c. The authorization will open in read-only mode. It is not possible to edit an authorization when it is opened from the EVV Scheduling tab.

Assign/Unassign EVV workers to EVV service authorizations (APD iConnect Application)

Users will authorize EVV services in the normal manner, using the existing planned services > plan validation > authorization functionality. Typically, each EVV authorized service will be assigned a primary and backup worker to limit the number of individuals that can see the consumer and the services they're receiving but doesn't require a supervisor to continually update assignments when primary workers are on vacation or otherwise need coverage by a peer. Provider EVV Managers can associate their EVV workers, who are the individuals that will render the services to consumers, to EVV service authorizations from the EVV Scheduling tab. Assigning an EVV Worker from the EVV Scheduling tab controls which consumers are visible to the workers in the Mobile Site.

1. Navigate to the Provider record and click on the EVV Scheduling tab.

2. If desired, filter to see the desired consumer(s) as described in the previous section.

3. Check the box to the right of each EVV authorization for which an EVV worker needs to be assigned, modified, or removed.

    a. Checking the box at the top of the grid (listview) will select all service authorizations on the screen.

iConnect ID	Consumer Name	Consumer Street Adddress	Consumer City	Consumer State	Consumer Zip Code	Consumer County	Consumer Region	Auth ID	Auth Svc ID	Service Code	Service	Service Start Date	Service End Date	Primary EVV Worker	Worker Start Date	Worker End Date	☑
10050	Duck,Daisy	9874 Pond Dr.,	MIAMI	FL	33101	MIAMI-DADE		140901	290	T1000:UC	(4161) Private Duty Nursing - LPN	01/02/2020	06/30/2020				☑
10237	Tester,John EVV	123 Home St.,	TAMPA	FL	33601	HILLSBOROUGH	SUNCOAST	140900	289	T1000:UC	(4161) Private Duty Nursing - LPN	12/01/2019	04/01/2020				☑
10172	Sheppard,Violet	123 Florida St,	ALACHUA	FL	32615	ALACHUA	NORTHEAST	140903	292	S5130:UC	(4140) Personal Supports	02/01/2020	06/30/2020				☑

4. Select "Assign/Change EVV Worker" from the File menu.

5. The "Assign/Change EVV Worker" dialog box will be displayed.

6. To assign a worker when one is not already assigned or change the assigned worker from one worker to another, select the type of worker to be assigned/updated.

7. Select the worker to be assigned to the selected records.

8. Enter a Worker Start Date and End Date.

   a. If dates are populated, they are used to grant or remove visibility to <u>consumer</u> within the Mobile Site.

   b. If no dates are populated, the assigned EVV workers will always be able to see the <u>consumer</u> in the Mobile Site.

   c. Visibility of the <u>EVV services</u> in the Mobile Site is dependent on the start date of the service and the current date, not the Worker Start and End dates.

9. Click "Update Records" to assign/change the assigned worker or "Cancel" to return to the EVV Scheduling tab without making any changes.
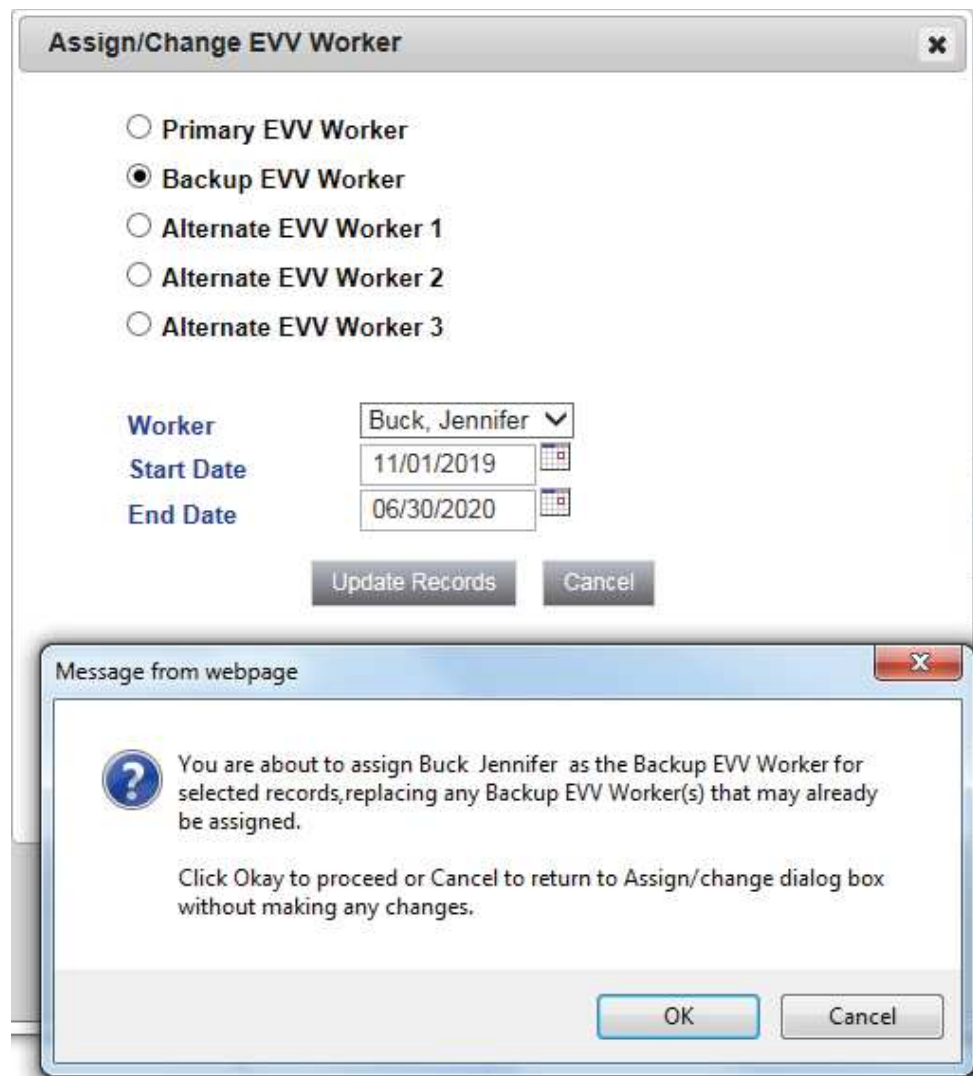
10. A confirmation message will be displayed. Click "Okay" to proceed or "Cancel' to abort the changes.

11. The system will assign the specified EVV worker to each selected record as the specified worker type. If another worker was already assigned to the record, they will be replaced by the new worker.

12. To remove an EVV worker without adding a replacement

    a. Select the type of EVV worker (Primary, Back-up, etc.) to be removed.

    b. Make sure the worker field is blank.

    c. Click "Update Records" to remove the assigned worker(s) or "Cancel" to return to the EVV Scheduling tab without making any changes.

    d. A confirmation message will be displayed. Click "Okay" to proceed or "Cancel' to abort the changes.

    e. The system will remove any existing workers and, if present, their Worker Start and End Dates.

Download/Sync Consumer and Authorization Data (Mobile Site)

EVV workers are responsible for delivering EVV services to the consumer. In most cases, EVV workers will work exclusively in the Mobile Site. The Mobile Site allows EVV workers to:

- Download/Sync appropriate consumer and authorization data
- Create delivery rosters
- Record service deliveries

- Upload completed deliveries to iConnect application

1. To record a service delivery, the Mobile Site must have consumer and authorization data. Workers can sync consumer and authorization data from the iConnect application to their mobile device anytime they have internet connectivity. The sync process downloads all consumer and authorization data that the worker has permission to see to the Mobile Site. It also removes consumer and authorization data that the worker might have been able to see previously but has now lost access. (e.g., worker is no longer an assigned EVV worker for a given consumer.)

2. Click the Mobile Site link from the Centrify home page to log in.

3. Select Sync Data from the Toolbar.

Home	Home	Consumers	Delivery Rosters	Current Deliveries	Sync Data	Manage Password	Log Out

👤 Consumers

☰ Delivery Rosters

✏ Current Deliveries

🔄 Sync Data
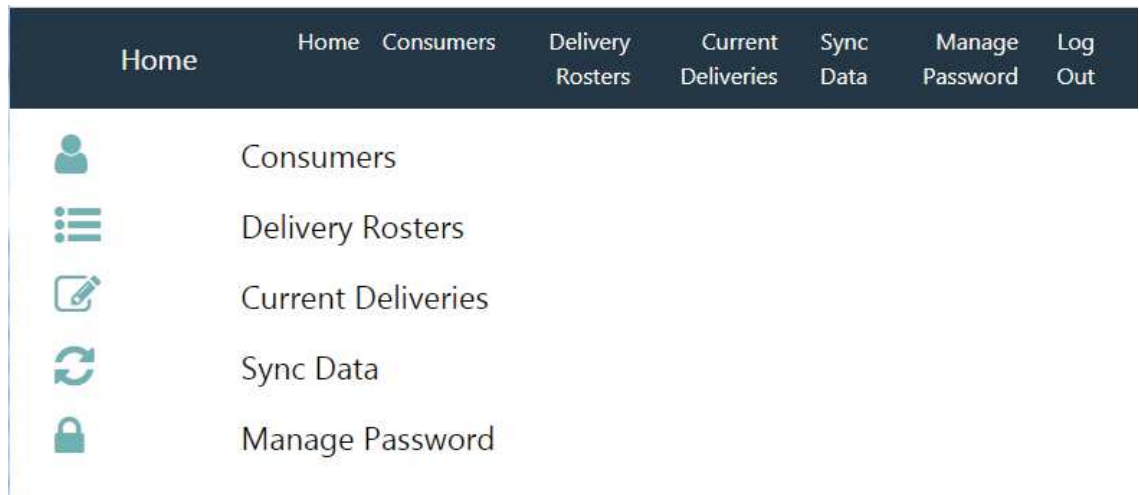
🔒 Manage Password

4. Select the Sync link.

| Sync Data | Home | Consumers | Delivery Rosters | Current Deliveries | Sync Data | Manage Password | Log Out |

SYNC

2 Consumers

2 Consumer Locations

4 Consumer Services

6 Consumer Workers

1 Rosters

1 Consumer Deliveries

0 Delivery Pictures

0 Delivery Signatures

5. The system will:

   a. Download new consumers and their authorization data. New consumers are not automatically added to a delivery roster.

   b. Update existing consumers whose data has been modified in the iConnect application.

   c. Remove consumers and their authorization data for consumers that are no longer associated to the worker.

      • Consumers are also removed from delivery rosters.

      • Service deliveries that have not been uploaded for consumers that are no longer associated to the worker are not deleted. They can still be completed and uploaded.
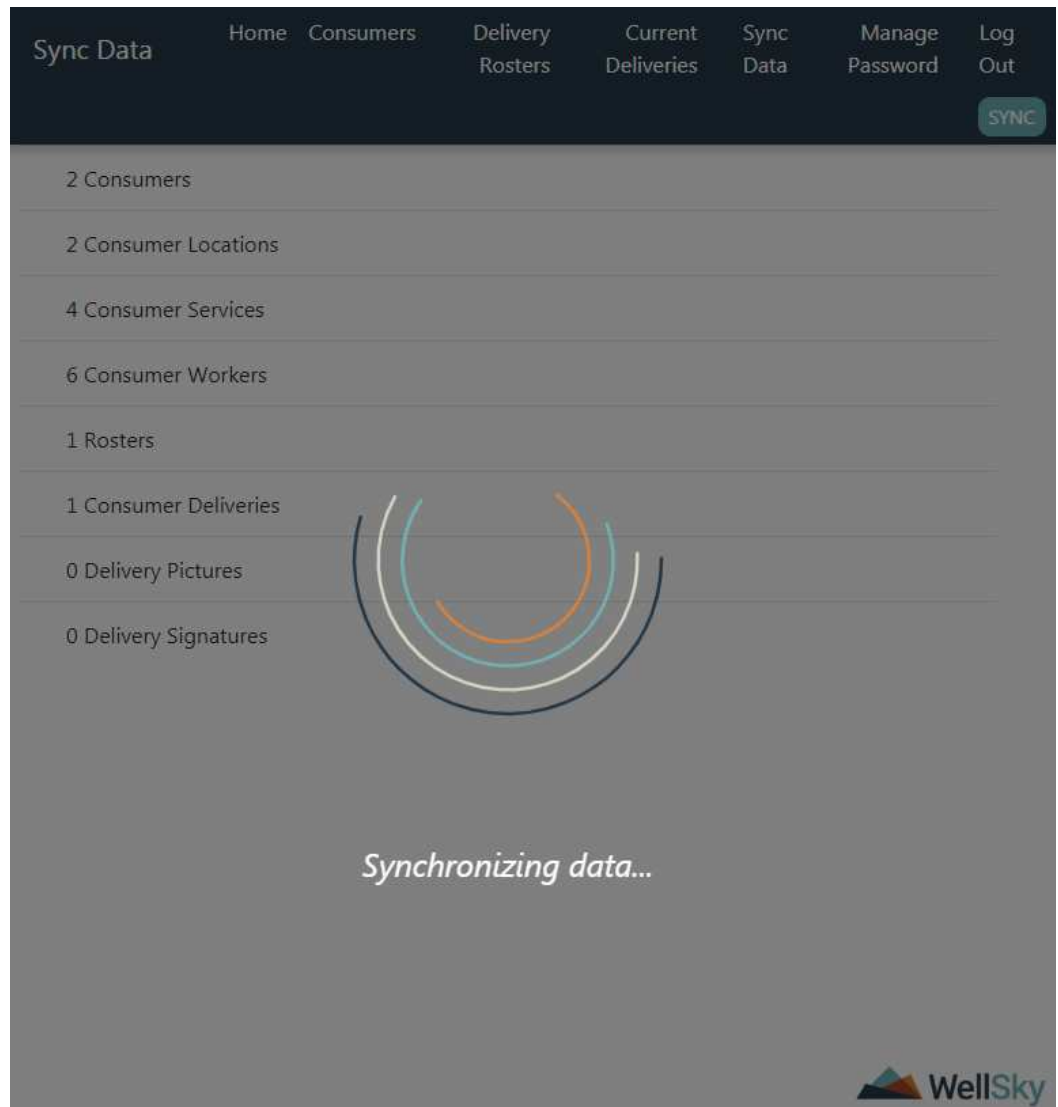
View Consumer Lists (Mobile Site)

Consumers demographic and authorization data is the basis for EVV service deliveries. Data can be viewed from consumer lists which are based on the relationship of the worker to the consumer or from delivery rosters which are defined by the worker.

1. From the main menu, select "Consumers."
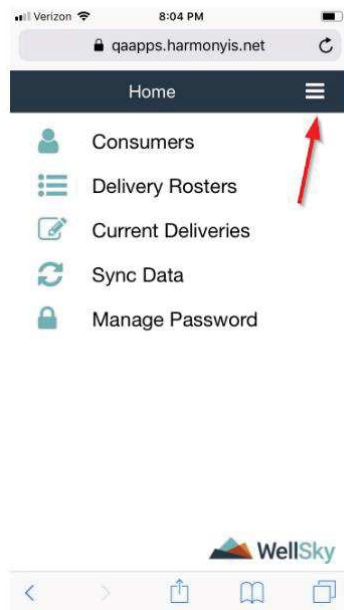
2. Select one of the following options:

   a. All Consumers: System displays all consumers to which the EVV worker has visibility

   b. Consumers Assigned to Me: System displays all consumers to which the EVV worker is assigned as the Primary EVV Worker

   c. Consumers for which I'm the Backup: System displays all consumers to which the EVV worker is assigned as the Backup EVV Worker

   d. Consumers for which I'm an Alternate: System displays all consumers to which the EVV worker is assigned as the Alternate EVV Worker 1, Alternate EVV Worker 2, or Alternate EVV Worker 3
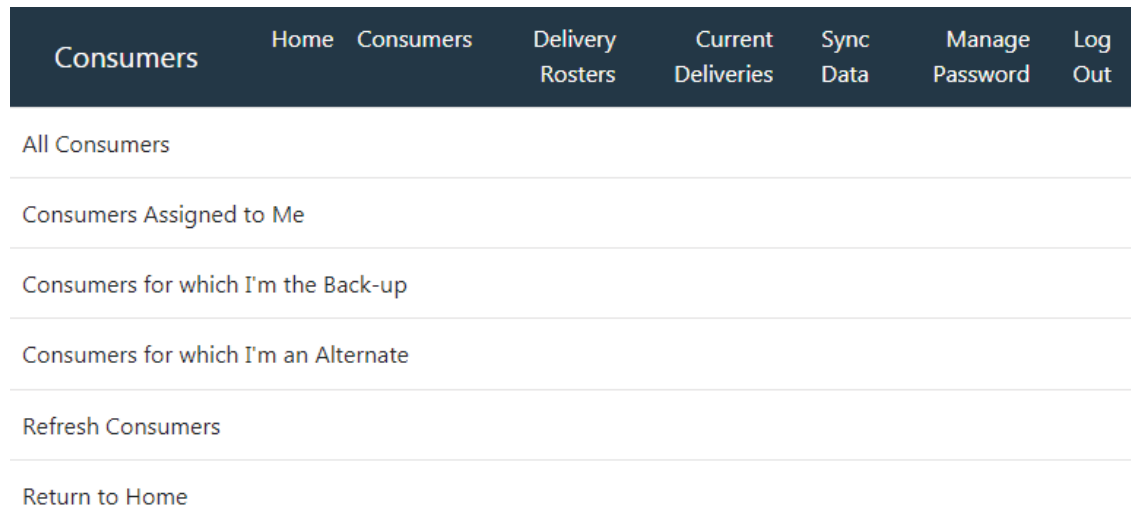
3. Select a consumer from the list.

4. Consumers that appear in a consumer list in red italics are consumers that are not currently assigned to a delivery roster. This helps EVV worker quickly see new consumers that have been assigned to them and need to be added into their delivery route.
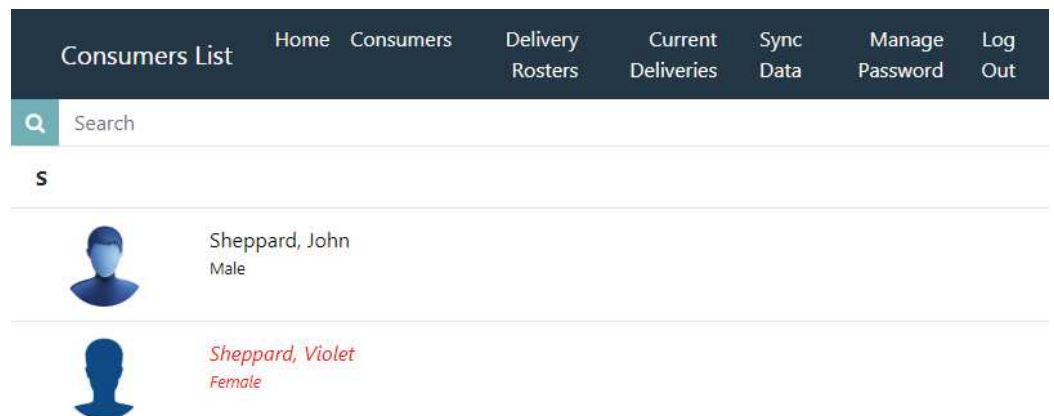
Viewing Consumer Details (Mobile Site)

The consumer detail page houses consumer demographic details, special notes, approved delivery locations, approved services, current deliveries, and worker information. This information is most useful for the EVV worker when they get a new consumer or need additional information on a consumer. Information in this area is all read-only. Consumer data cannot be updated from within the Mobile Site. EVV workers can initiate a new service delivery from the consumer detail screen, though most EVV workers will do this from within a delivery roster.
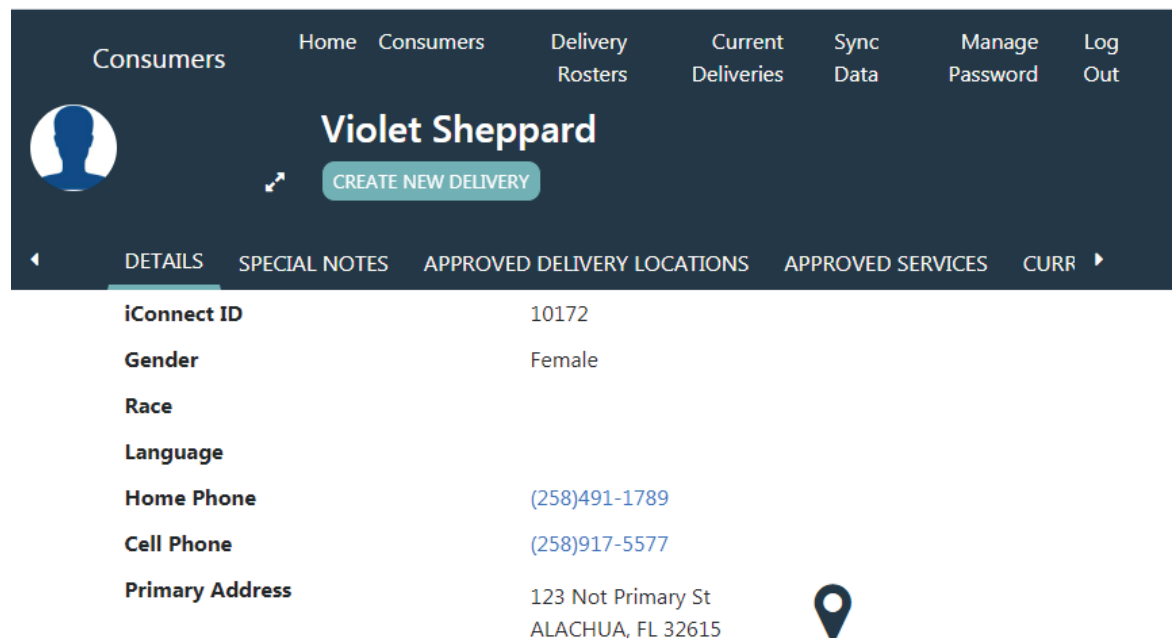
1. From the main menu, select Consumers and then select the appropriate list.

2. Select a consumer from the list.

Details

3. The consumer's Details page will be presented. The name and a photo of the consumer will be visible at the top of the screen. The photo can be used by the EVV worker to confirm that they are delivering a service to the correct consumer.

   a. The photo shown is from the Consumers > Edit Demographics screen in the iConnect application. The WSC will take this photo. This is not a photo taken by the EVV worker.

   b. Click on the photo to view a larger version of the photo. Click on the photo again to return to the thumbnail view.

4. To dial the consumer's home or cell phone, click the phone number. Your mobile device will offer to dial the number.

   NOTE: This feature may not be available on all devices as each operating system manages this type of control independently from the iConnect EVV Mobile Site.

5. The consumer's residential, primary address will display on the Details page for reference only. The approved delivery locations are not listed on this Details page, they are located on the Approved Delivery Locations page.

Approved Delivery Locations

6. Click on the "Approved Delivery Locations" menu. The addresses at which the consumer is authorized to receive services are listed. This includes the active, residence address of the consumer, guardian, guardian advocate or parent. The information on this page is read-only.

Residence Address (Relation)
123 Not Primary St
ALACHUA, FL 32615

   a. To view an address on a map, click the map icon in the address field. A map overlay will be displayed.

   b. Use the "+" and "- "signs or "pinch-zoom" to zoom in and out.

   c. Use your finger to move the map.

   d. Click the "X" in the upper right corner to close the map and return to the Approved Delivery Locations page.
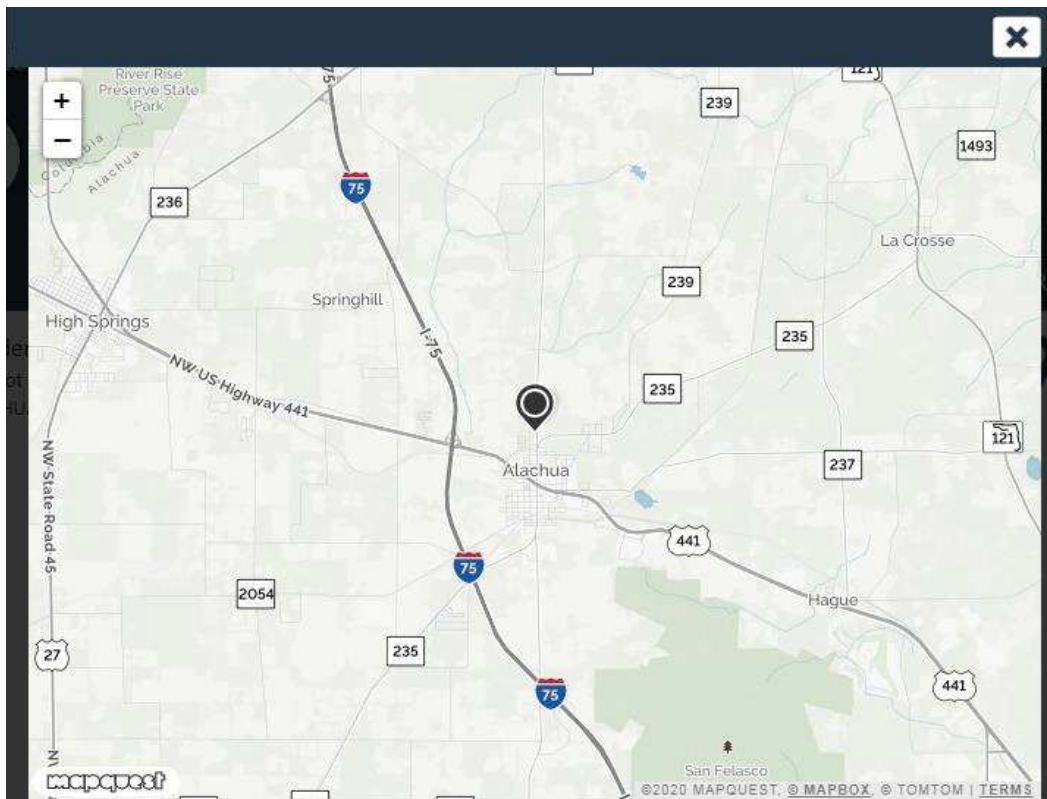
Approved Services

   7. Click on the "Approved Services" menu. The consumer's EVV service authorizations are listed. The information on this page is read-only.

Violet Sheppard

Home Consumers Delivery Rosters Current Deliveries Sync Data Manage Password Log Out

CREATE NEW DELIVERY

DETAILS SPECIAL NOTES APPROVED DELIVERY LOCATIONS APPROVED SERVICES CURR

(4140) Personal Supports (S5130:UC)
01/07/2020 - 01/31/2020
Auth Id: 140905
Total Units: 75
Unit Type: 15 mins
Instructions/Notes:

Current Deliveries

8. Click on the "Current Deliveries" menu. Service deliveries for the consumer that have been started and not completed or completed but not yet uploaded to the iConnect application are listed.

John Sheppard

Home Consumers Delivery Rosters Current Deliveries Sync Data Manage Password Log Out

CREATE NEW DELIVERY

DETAILS SPECIAL NOTES APPROVED DELIVERY LOCATIONS APPROVED SERVICES CURRENT DELIVERIES WC

() - 12/19/2019

Workers

9. Click on the "Workers" menu. The EVV workers associated to the consumer are listed. The information on this page is read-only.

Vogeler, Mandi (Backup EVV Worker)

Division: APD
Worker Cell Phone:

Buck, Jennifer (Primary EVV Worker)

Division: APD
Worker Cell Phone: (111)111-1111

Buck, Jennifer (Specialist/Liaison)

Division: APD
Worker Cell Phone: (111)111-1111

Create Delivery Rosters (Mobile Site)

Delivery rosters can be created by the EVV worker to help ensure that they deliver services to all consumers assigned to them. Delivery rosters can only be created from within the Mobile Site. Rosters can be based on several criteria including service, consumer location, and the relationship of the EVV worker to the consumer. For example, if an EVV worker may deliver personal care to consumers in County 1 on Mondays and Thursdays and in County 2 on Tuesdays and Fridays; using service and location in their roster filters, they could create a roster for MTh Personal Care and another for TF Personal Care.

1. From the main menu, select Delivery Rosters.

2. The list of delivery rosters (if any are present) will be displayed.

3. Click the + sign to add a delivery roster.

Delivery Rosters   Home   Consumers   Delivery Rosters   Current Deliveries   Sync Data   Manage Password   Log Out

\+

EVV Test

4. The Add/Edit Roster screen will be displayed.

5. Enter a name for the roster.

Add or Edit Roster   Home   Consumers   Delivery Rosters   Current Deliveries   Sync Data   Manage Password   Log Out

SAVE

Roster Name   Personal Supports on Thursdays

Service   ➕

Consumers Groups   ➕

Consumers   ➕

Consumer Locations   ➕

➕

6. To create a roster that shows consumers based on their authorized services, click the Service option.

   a. The Add Services screen will be displayed.

   b. Select one or more services.

   c. Click the check to save and return to Add/Edit Rosters screen.

7. To create a roster that shows consumers based on their relationship to the EVV worker OR to add individual consumers, click the Consumers Groups option.

   a. The Add Consumers screen will be displayed.

b. To add consumers based on their relationship to the EVV worker, select one or more of the following options:

- Only Consumers Assigned to Me

- Only Consumers for which I'm the Backup

- Only Consumers for which I'm an Alternate Worker

8. To create a roster that contains specific consumers, select the Consumers option.

a. Select the consumer(s) to add to the roster.
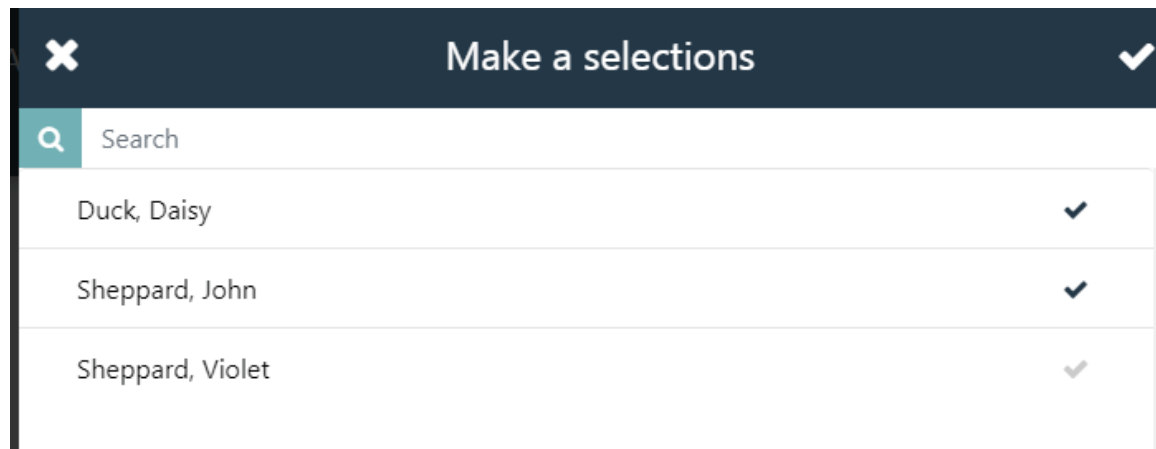
b. Click the check to save and return to Add/Edit Rosters screen.

9. To create a roster that shows consumers based on their county, click the first Consumer Locations option.

a. The Add/Edit Consumer Locations screen will be displayed.

b. Select one or more of the listed counties.

c. Click the check to save and return to Add/Edit Rosters screen.

10. To create a roster that shows consumers based on their city, click the first Consumer Locations option.

a. The Add/Edit Consumer Locations screen will be displayed.

b. Select one or more of the listed cities.

c. Click the check to save and return to Add/Edit Rosters screen.

11. Click Save to save the roster.

Viewing a Delivery Roster

12. From the main menu, select Delivery Rosters.

13. The list of delivery rosters (if any are present) will be displayed. Click on the appropriate roster.

14. The roster will open and display a list of consumers

Editing a Delivery Roster

15. From the main menu, select Delivery Rosters.

16. The list of delivery rosters (if any are present) will be displayed.

17. Click Edit and select the roster to be edited.

18. Add/remove items as in the same manner used for creating a new roster.

19. Click Save to save the updated roster.

Recording a Service Delivery (Mobile Site)

Recording a service delivery requires the following actions:

1. Initiate a delivery
2. Start and deliver a service
3. End the delivery
4. Add delivery notes
5. Upload delivery to iConnect application

Initiate a Delivery

1. From the main menu, select Consumers and then select the appropriate list.

2. Select a consumer.

3. Click Create New Delivery to display the service delivery screen

   OR

4. From the main menu, select Delivery Rosters and then select the appropriate roster.
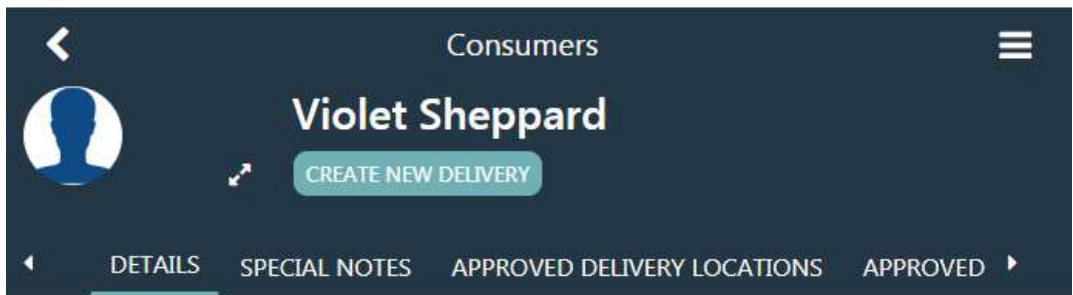
5. Select a consumer to display the service delivery screen. The consumer's iConnect ID and the start date will auto-populate and cannot be edited.
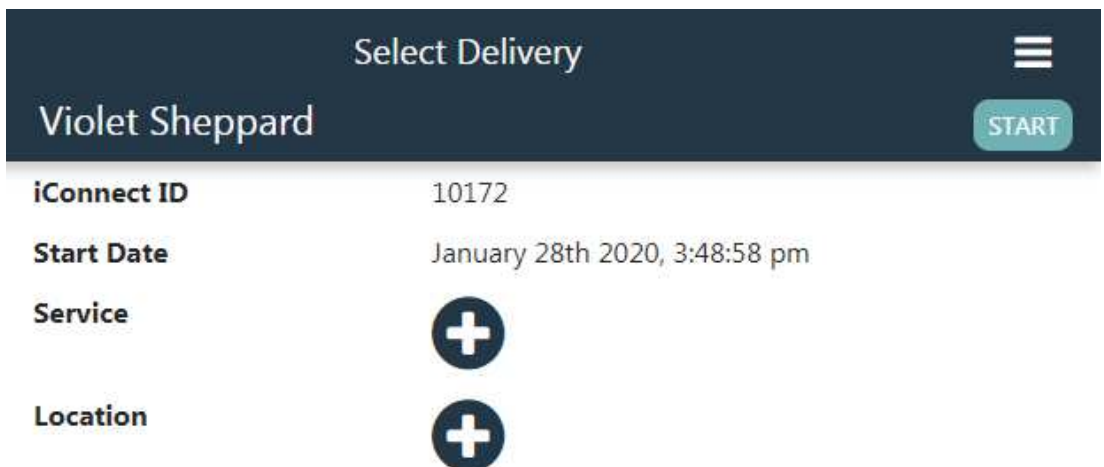
6. Select a service by clicking the + icon. Only the consumer's approved services will be shown.

Approved Services

(4140) Personal Supports (S5130:UC)
01/07/2020 - 01/31/2020
Total Units: 75
Unit Type: 15 mins

(4140) Personal Supports (S5130:UC)
02/01/2020 - 06/30/2020
Total Units: 453
Unit Type: 15 mins

7. Select the location by clicking the + icon. Only a consumer's approved locations will be shown.

    a. If the service is being delivered at an approved location, select the location.

Approved Location

Residence Address (Relation)
123 Not Primary St
ALACHUA, FL 32615

Other Location...

Enter location name (e.g., Doctor's office)

Enter street address

Enter apartment, unit, or suite #

Enter a city name

Enter a state

Type a zipcode

    b. If the service is being delivered at a non-approved location, enter a description (e.g., Doctor's office) and the full address (street, city, state, zip code.)

8. The Provider will select the Documentation Type for this service.

9. The selected service and location populate on the Service Delivery page. Click Start.

10. The system will check if the location services are active on the EVV Worker's mobile device. If not the EVV Worker will be prompted that Geolocation is disabled and must acknowledge to proceed with the service or click No to enable geolocation before starting the delivery. Service deliveries recorded without geolocation enabled will be marked with a violation when it is uploaded.

   a. Enabling Location Services is different than having internet connectivity and/or access to GPS coordinates. Enabling or "turning on" location services ensures that if connectivity is available, GPS coordinates will automatically be obtained.

11. If the error message "The destination is at a greater distance than the allowable distance threshold. Are you sure you want to proceed anyway?" is displayed, the Mobile Site has detected that the mobile device is outside of the geofence set for the selected service.

Allowable Distance

The destination is at a greater distance than the allowable distance threshold. Are you sure you want to proceed anyway?

YES   NO

   a. Select Yes to continue delivering the service (the service will be marked with a violation when it is uploaded).

   b. Select No to return to the service delivery screen. Either select another location or move closer to the selected location and reinitiate the service delivery.

Start and Deliver a Service

Service deliveries can be recorded in the presence or absence of internet connectivity. If connected, the Mobile Site will automatically capture the date, time, and GPS location of the worker at the start and end of each service delivery. If not connected, the Mobile Site will record the service delivery, but the provider EVV supervisor may be asked to justify or explain the lack of GPS data after the service delivery has been uploaded to the iConnect application and prior to billing.

1. After selecting Start on the Service Delivery, the service delivery screen will update. The Service and Location will all be made read-only.

2. The start date and time will auto-populate and will be read-only.

Service Delivery for Violet Sheppard

END DELIVERY **DELETE DELIVERY**

iConnect ID	10172
Service	(4140) Personal Supports
	Unit Type: 15 mins
Location	Residence Address
	123 Not Primary St
	ALACHUA, FL, 32615

Delivery Start

Start Date	01/28/2020
Time	3:58 pm
Location	📍
Address	2345 Cherrystone Rd
	Cape Charles, VA, 23310-4037

Delivery Details

Units Delivered	0.07
Notes	➕

3. The latitude/longitude of the mobile device is captured and a reverse address lookup will be done. The address where the mobile device is located will be shown. If data is not present, the starting address field will be populated with "Unavailable."

4. The Units Delivered calculation begins and updates until the service delivery is ended.

5. The service delivery screen will remain open unless you navigate to another screen or the application times out but will now also be accessible from the Current Deliveries section on the main menu or the Current Deliveries section of the Consumer Detail page.

6. If you need to record multiple service deliveries simultaneously (e.g., delivering services using a 1:3 ratio), repeat the above steps for each consumer and/or service.

End the Delivery

1. If not already on the Service Delivery screen, navigate to the Service Delivery screen from one of the options below:

   a. Option 1: From Main Menu > (shows all deliveries across all consumers)

      i. Click on Current Deliveries from the main menu.

   b. Option 2: From Consumer Detail screen (shows deliveries for the selected consumer only)

      i. Navigate to the appropriate consumer record.

      ii. Click on Current Deliveries.

2. Select the appropriate delivery.

3. Click End Delivery.
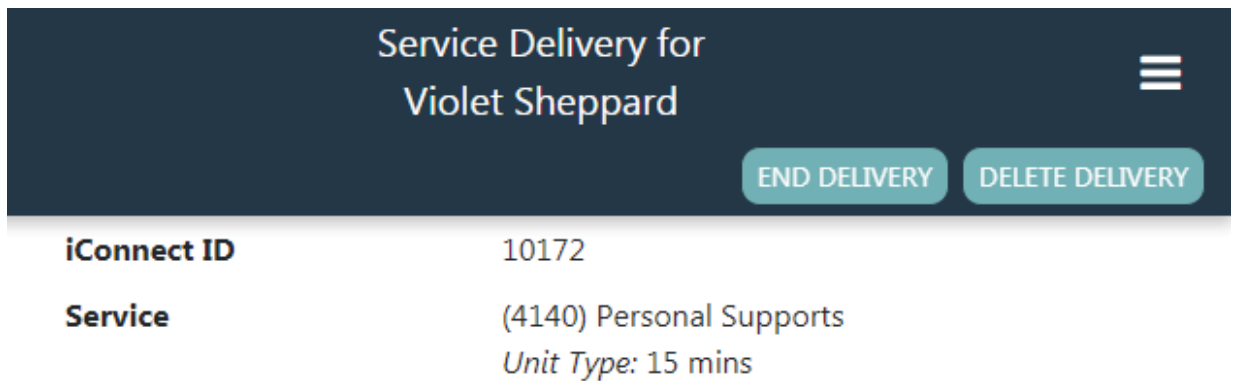
4. The service delivery screen will update. The end time will auto-populate and will be read-only.

5. If the service delivered is time-based, the units delivered will auto-populate and will be read-only.

   a. If the service is not time-based, enter the units delivered.

6. OPTIONAL: Get the consumer or legal representative's signature

   a. Click on the + icon next to signature

Time	9:42 am
Location	📍
Address	957 Meizner Real Ave Brandon, FL, 33511-8808
Delivery End	
Time	9:44 am
Location	📍
Address	957 Meizner Real Ave Brandon, FL, 33511-8808
Delivery Details	
Units Delivered	0.17
Place of Service	➕
Notes	➕
Provider Documentation	➕
Signature	➕ ⬅

    a. On the new screen that opens, have the consumer/legal representative use their finger/stylus to sign.

    b. Click the ✓

7. You have finished working with this consumer and can complete the remaining steps in your car, or later at your office/home.

    c. Remember, the remaining steps must be completed on the same device.

8. If an EVV worker does not click the End Delivery button within 24 hours, the Mobile Site will end the delivery automatically.

    a. When uploaded, the activity will be flagged with a violation and marked as having been auto-ended.

Add Notes

1. EVV services are configured to require a note. A Service Delivery can be started and ended without adding a Note but the EVV Worker will not be able to upload a Service Delivery without a Note.
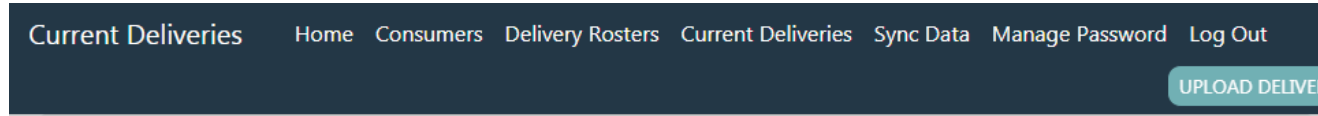
2. From the Service Delivery details page, select the + icon next to the Notes field.

3. Enter the service delivery note.

4. Click the Check icon.
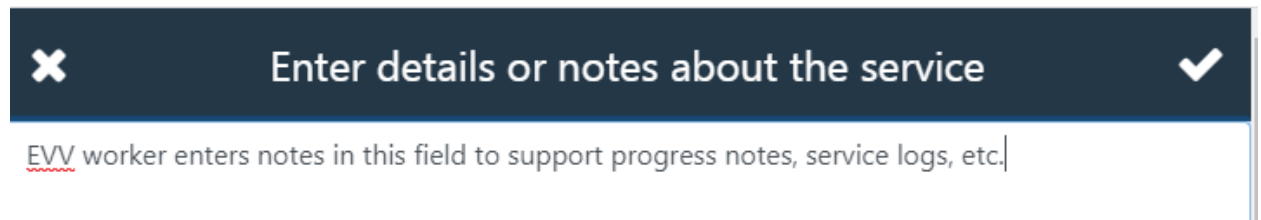
5. The Provider is returned to the Service Delivery details page where the notes are displayed.

Service Delivery for Violet Sheppard   Home   Consumers   Delivery Rosters   Current Deliveries   Sync Data   Manage Password   Log Out

UPLOAD DELIVERY   DELETE DELIVERY

iConnect ID	10172
Service	(4140) Personal Supports
	Unit Type: 15 mins
Location	Residence Address
	123 Not Primary St
	ALACHUA, FL, 32615

Delivery Start

Start Date	01/28/2020
Time	3:58 pm
Location	
Address	2345 Cherrystone Rd
	Cape Charles, VA, 23310-4037

Delivery End

Time	4:12 pm
Location	
Address	2345 Cherrystone Rd
	Cape Charles, VA, 23310-4037

Delivery Details

Units Delivered	0.6
Notes	

EVV worker enters notes in this field to support progress notes, service logs, etc.

6. The provider can edit the note by selecting the pencil icon, updating the note and then clicking the Check icon again.

Delete the Delivery

1. If a Service Delivery was created in error the provider can delete it.

2. Any time prior to upload, a service delivery can be deleted. If deleted, it cannot be restored. Deletion should be used sparingly and only in cases where a service delivery was created in error.

3. If not already on the Service Delivery screen, navigate to the Service Delivery screen from one of the options below:

    a. Option 1: From Main Menu > (shows all deliveries across all consumers)

        i. Click on Current Deliveries from the main menu.

    b. Option 2: From Consumer Detail screen (shows deliveries for the selected consumer only)

i.   Navigate to the appropriate consumer record.

    ii. Click on Current Deliveries.

4. Select the appropriate delivery.

5. Click Delete Delivery.

    a. Click "Yes" to delete the delivery or "No" to return to the service delivery screen without deleting the record.

Delete Service Delivery

Delete Service Delivery

YES   NO

6. The service delivery has been deleted.

Upload Delivery to APD iConnect Application

Completed service deliveries will be uploaded to the iConnect application. The Mobile Site will prevent users from uploading deliveries that do not contain all required data.

1. **Internet connectivity is required to upload service deliveries.**

2. From the main menu, select Current Deliveries. All services deliveries that have been started or completed but not yet uploaded will be displayed.

Current Deliveries   Home Consumers Delivery Rosters Current Deliveries Sync Data Manage Password Log Out

UPLOAD DELIVERIE

✔ Sheppard, Violet

0.6 units delivered of (4140) Personal Supports from January 28th 2020 03:58:16PM to January 28th 2020 04:12:35PM

Sheppard, John

1837.95 units delivered of (4161) Private Duty Nursing - LPN from December 19th 2019 12:44:40PM to January 7th 2020 04:13:53PM

🛇 Note is required.

3. Click Upload Deliveries to upload all completed deliveries.

4. Deliveries can also be uploaded one by one by navigating to the Consumer details page and selecting Current Deliveries to display on that consumer's deliveries.

(4140) Personal Supports (S5130:UC) - 01/28/2020

a. Select the delivery to open the Service Delivery details page. Select Upload Delivery.

5. If there are no issues, the message Upload Successful will be displayed and no additional action is needed.

6. If an internet connection is not detected, the following message will be displayed:

"You must be online to upload deliveries."

a. Connect to the internet and try again.

b. If you are sure you are connected to the internet and the error message continues to be displayed, contact your supervisor for assistance.

7. If there are issues with the Service Delivery, typically a note is required but not completed, an error message will be displayed.

8. To correct missing information, click on the record and add any missing data then upload again by following steps 1-5.

EVV Activities Tab (APD iConnect Application)

Service deliveries that are uploaded to the iConnect application from the Mobile Site are saved as EVV activity records. Provider EVV managers can search for and view individual activities or groups of activities. Searches can be saved so that the EVV manager can quickly call up a variety of lists based on their immediate business need. For example, a provider EVV manager might create and save a series of search filters for activities created by each worker they supervise to allow them ensure that each worker is delivering the services assigned to them in a timely manner and have another saved filter that shows only activities that have unresolved violations.

View EVV Activities

EVV service deliveries are recorded as EVV activities in iConnect. EVV activity records are visible in two locations – the consumer's record on the Provider Documentation tab and the provider's record on the EVV Activities tab. Provider EVV Managers will use the EVV Activities tab to review uploaded activities, justify violations, and initiate billing. FL APD staff will likely review activities in the context of QA processes. WSCs may also review EVV activities to ensure that consumers are receiving authorized services as per their support plan.

The standard activity detail page shows basic service delivery information such as start and end times, units delivered, service rendered, and worker. The EVV Details subpage displays EVV-specific information including the stated and actual delivery locations, delivery notes, and any validation requirements that the activity has violated.

1. When viewed from the Consumers > Provider Documentation (Activities) tab, EVV activities are always read-only. Editing of EVV activities to add place of service, must be done from the Provider > EVV Activities tab.

2. When viewed from the Providers > EVV Activities tab, select fields are editable based on whether the activity was created via upload from the Mobile Site or manually entered in iConnect.

3. Navigate to the provider record and select the EVV Activities tab.

4. Click on an activity from the search results grid (listview.) The activity will open.

5. If the activity was created via upload from the Mobile Site, most fields on the activity detail and EVV detail pages will be read-only (user will be able to see and justify violations.)

6. If the activity was manually entered in the iConnect application, all fields needed to record the activity will be editable.

EVV Activities Search Filters

1. Navigate to the provider record and click on the EVV Activities tab.

2. Specify one or more parameters in the filter section at the top of the grid (listview.)

3. Click Search to apply the filters. The screen will refresh to show only those EVV authorizations that meet the specified criteria.

4. Click Reset to clear all filters and start over

Save a filter:

1. Click Save As.

2. Enter a name for the filter.

3. Check Save As Default if you want the filter to auto-populate with the current criteria when the tab is opened.

4. Click Save to save the filter or Cancel to return to the EVV Activities tab without saving the filter.
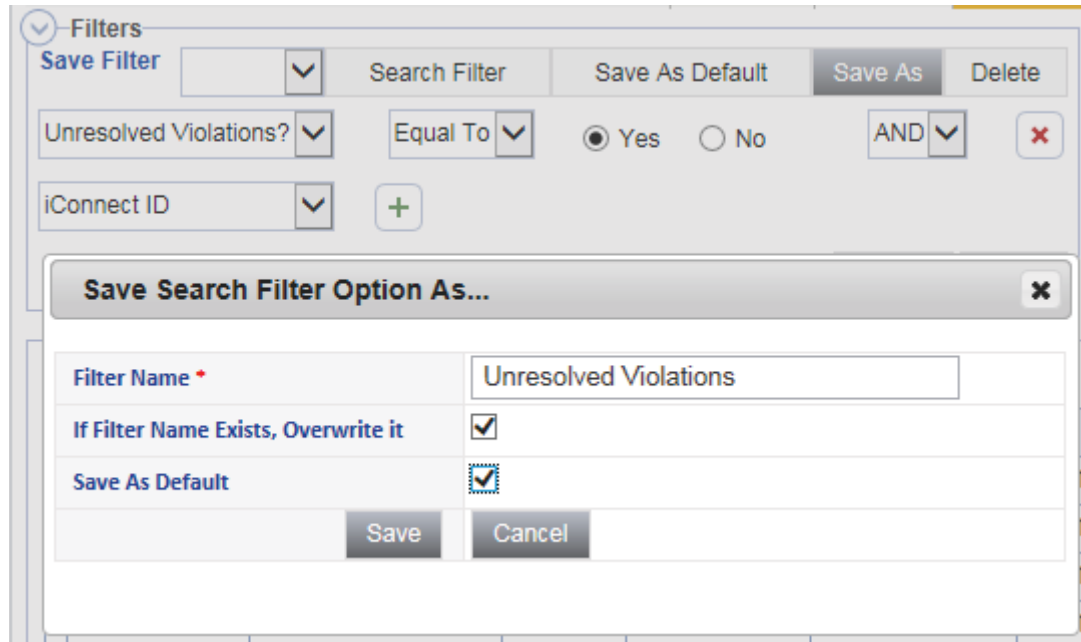
Apply a saved filter:

1. Select the appropriate saved search from the Save Filter dropdown in the Filters section of the screen.

2. Click Search Filter to populate the search filter with the saved criteria.

3. Click Search to apply the search criteria.

Edit a saved filter:

1. Select the appropriate saved search from the Save Filter dropdown in the Filters section of the screen.

2. Click Search Filter to populate the search filter with the saved criteria.

3. Edit the filter, adding, changing, or removing criteria as appropriate.

4. Click Save As.

5. Check If Filter Name Exists, Overwrite It.

    a. Click Save.

    b. The existing saved search will be updated.

6. Enter a new filter name.

    a. Click Save.

    b. The edited filter will be saved with the specified name. The original saved search filter will still exist and will not be updated.

Deleting a saved filter:

1. Select the appropriate saved search from the Save Filter dropdown in the Filters section of the screen.

2. Click Delete.

3. Click OK to confirm the deletion or Cancel to abort the deletion.

4. The filter will be deleted.

Save a saved search filter as default:

1. Select the appropriate saved search from the Save Filter dropdown in the Filters section of the screen.

2. Click Save as Default.

3. The selected filter will be saved as the default filter. The next time the EVV Activities tab is opened, the filter will auto-populate with the criteria of the saved filter.

Save Search Filter Option As...		✖
Filter Name *	Unresolved Violations	
If Filter Name Exists, Overwrite it	✔	
Save As Default	✔	
	Save	Cancel

Update EVV Activities

1. Certain data elements need to be defined on each EVV Activity before it can be submitted for claims processing.

2. Navigate to the provider record and select the EVV Activities tab.

3. Click on an activity from the search results grid (listview.) The activity will open.

4. Update the following fields:

   a. Place of Service = select Home, Office or Other

   b. Diagnosis Code = If it does not auto-populate, add the APD Eligible Diagnosis from the Diagnosis tab of the consumer

   c. Provider Documentation = these values will populate from the uploaded delivery

   d. Status = Complete

Manual Entry of EVV Activity

The intent of EVV is to capture service delivery location, start time, and end time at the time and point of delivery. However, there will be situations in which a worker's mobile device fails and service deliveries must be reconstructed and manually entered in the iConnect application as EVV Activities. Manually entered EVV activities require the data elements as activities created within the Mobile Site. The only data that will consistently be missing is GPS location data.

1. Navigate to the provider record and click on the EVV Activities tab.

2. Select Add EVV Activity from the File menu.

3. The Activity detail page will be displayed.

4. Enter the start date and start time. Enter the end date and end time.

5. Click Add.

6. The screen will refresh and auto-calculate the total elapsed time in minutes.

7. Click the ellipsis to the right of the authorization field.

8. A dialog box will be presented.

9. Search for and select the appropriate authorization.

10. The screen will refresh and auto-populate several fields. If the service is time-based, units will also auto-populate.

11. Enter the EVV worker that delivered the service in the Worker field.

12. Status can remain Pending.

13. The Primary Diagnosis will auto populate from the consumer's record if the diagnosis record is in complete status.

14. Select one or more values for Provider Documentation.

15. Delivered via EVV will default to Manual Entry and be read only.

16. Select a Place of Service.

17. From the File menu select Save.

18. The screen will refresh and the EVV Details subpage will be visible.

19. Click on the EVV Details subpage.

20. In the Stated Delivery Address section, use the ellipsis to select the appropriate address from the list of approved delivery locations.

21. If needed, select address not shown to enter a different location. This manual entry will be flagged with a violation.

22. The system will automatically determine the latitude and longitude of the selected address.

23. The Start Location and End Location sections will automatically populate with Unavailable.

24. Enter a note.

25. From the File menu, select Save.

26. The screen will refresh and violations will automatically be created for the manual entry and the other location entry if a delivery address was manually added.

Validate EVV Activities

Standard EVV validation rules include violations and billing rules. Any violations that fail will display on the EVV Details page. Billing rules that fail are visible on Billing Issue report that can be executed from the EVV Activities List, EVV Activities Details page and the Consumer Activity Details page.

1. This validation is completed automatically when the service deliveries are uploaded from the mobile site. The validation of manually added EVV activities must be completed manually.

2. Select the EVV Activities tab on the Provider record.

3. From the list view, add a check to each EVV Activity that needs to be validated, and or select the box at the top to select all.

4. From the **File** menu > select **Validate Selected Items.**

5. Notification that the validation is successful displays. Click OK.
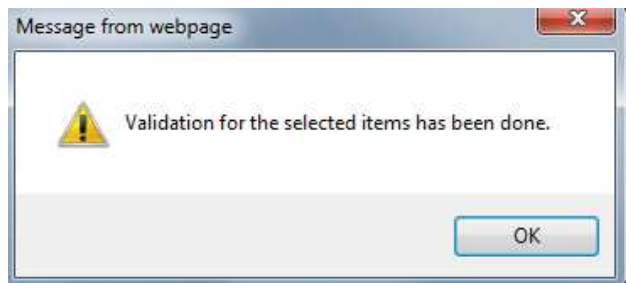
6. The Unresolved Violation column on the EVV Activities List View page updates to Yes when violations are present. Violations are visible and must be justified on the EVV Details page. Once violations are justified and revalidated, the Unresolved Violation column updates to No. EVV Violations are described in the EVV Validation Rules section of this manual.

Justifying Violations (APD iConnect Application)

When a service delivery is uploaded to the iConnect application as an EVV activity, additional validation is applied to ensure that the activity complies with all EVV requirements for that service beyond the validation that was applied in the Mobile Site. When this occurs, the details of the violation(s) are visible on the EVV Details > Violation Detail page. Depending

on the violation and how the service code has been configured, a provider EVV manager may be permitted to provide a justification (explanation) and proceed with billing.

1. Identify activities with violations: Navigate to the Provider record and click on the EVV Activities tab.

2. Use the search filters to isolate activities with violations

   a. Using a filter of "Unresolved EVV Violation(s)?" Equal to Yes will return all activities that have a violation that has not yet been justified.

3. Use additional filters such as date or service to further refine the results.

4. Click on an activity in the listview to open the activity detail page.

5. Click on the EVV Details subpage to see the specific violations.

File

EW Activities

EVV Details

Stated Delivery Address

Address	Other Location (Approved Location): 2345 Cherrystone Rd., Cape Charles Virginia 2 ...
iConnect ID	10172
Lat/Long	
Allowable Difference (feet)	500

Start Location

Recorded Lat/Long	Lat: Unavailable, Long: Unavailable
Address	Unavailable
Actual Difference (feet)	

End Location

Recorded Lat/Long	Lat: Unavailable, Long: Unavailable
Address	Unavailable
Actual Difference (feet)	

Delivery Notes

Notes	service provider's delivery notes and progress note details go here. 10,000 character limit.

1907 characters remaining |

3 Violations record(s) returned - now viewing 1 through 3

Violation Type ▲	Violation SubType	Violation Status	Violation Reason	
EW	Manual Entry	Unresolved		
Note Required	Service	Unresolved		
Note Required	Other Location	Unresolved		

6. Click on a violation to see full details.

7. The violation type, subtype, and description are all read-only fields that classify the violation and provider a user-friendly, plain text description of the violation.

8. The status of the violation will be defaulted to "Unresolved".

9. Change the status to "Unable to justify" if the violation is one that, regardless of justification, cannot be billed.

10. Change the status to "Justified" if the violation can be explained and then billed.

11. Populate the Violation Reason field from the associated dropdown menu.

12. Enter a justification (explanation) in the Violation Comments field.

13. Click File, then Save and Close Violation Detail. The page refreshes and the EVV Details page displays. The violation list view has been updated.

14. Repeat for each violation associated to the activity. When all violations are resolved, the Unresolved Violations? Indicator will change from Yes to No. The provider may then proceed with scrubbing the activity against the billing rules and once passed, submitting the claim.

Billing EVV Activities (APD iConnect Application)

Once the violations have been addressed, the EVV activity will be validated against the billing rules described in the EVV Validation Rules section of this manual. Billing rules that fail are visible on Billing Issue report that can be executed from the EVV Activities List, EVV Activities Details page and in the Consumer Activity Details page.

After passing validation, when a provider EVV manager is ready to bill, they select the appropriate activities from the EVV Activities tab and click the Bill Selected Items option. The activities will automatically be converted into claims and submitted to the claims workflow. At this point, they behave and are managed like any other claim in iConnect – results are visible in the Claims grid. iConnect will automatically "lock" (read-only) activity records that are associated with claims that are "in process" (do not have final remittance) or have been approved for payment; conversely, iConnect will "unlock" (editable) activity records associated with denied or voided claims.

1. Navigate to the Provider record and select the EVV Activities tab.

2. Use the search filters to isolate EVV activities that do not have any unresolved violations but have not yet been scrubbed against the billing rules.

   a. Using a filter of "Unresolved EVV Violation(s)?" Equal to No and "EVV Billable" Equal to No will return all activities that have no unresolved violations and have not yet been scrubbed.

3. Select each activity and the EVV Activity page displays. From the Report menu, select EVV Billing Issues to view the billing rules that must be satisfied before the EVV activity can be submitted as a claim. See the EVV Validation Rules section for details on the EVV Billing Rules.

4. The EVV Billing Issues report displays in a new window, listing each billing rule the EVV activity does not satisfy. These are issues that the service provider cannot resolve. The APD Regional or State Office staff must be contacted to resolve the issues.

5. Once the EVV activity has no unresolved violations and does not violate any billing rules, it can be billed.

6. From the EVV Activities tab, use the search filters to isolate billable activities.

   a. Using a filter of "Unresolved EVV Violation(s)?" Equal to No and "Billed" Equal to No will return all activities that no unresolved violations and have not yet been billed.

7. Use additional filters such as date or service to further refine the results.

8. Check the box to the left of each activity to be billed (check the box at the top of the column to select all activities on the screen).

9. Select "Bill Selected Items" from the File menu.

10. The Bill EVV Activities dialog box displays. Enter a batch number. Click Okay.

11. iConnect will convert the selected activities to claims and automatically submit them to the claims workflow.

12. If the provider tries to bill EVV activities that still have violations or outstanding billing rules, the application will not submit the EVV activity to the claims workflow.

EVV Remittance Processes (APD iConnect Application)

Submitted claims are automatically processed and adjudicated. The **Claims** chapter, commonly referred to as the Claims Grid, allows users to view the results of applying the business rules and adjudication, and the current status of claims.

For Waiver services the remittance from FMMIS will automatically be posted in iConnect, though FMMIS will continue to issue the payment requests as they do today. From a business process perspective, this is a change for providers as they previously billed directly to FMMIS.

Use the filter on the Claims grid to isolate the appropriate Claims. It is useful to view the Batch No and Submit Date to verify that Claims that were just submitted conformed to the rules.

- **Claim status** indicates where in the workflow the claim is and is not necessarily a terminal (final) status.
- **Remittance status** indicates if the Claim was paid, denied, or voided and is a terminal (final) status.
- **Claims without a remittance status** are locked and no action can be taken until remittance advice is posted.
- **Claims with a remittance status of Denied** can be corrected and resubmitted.
- **Claims with a remittance status of Paid** can be voided.

Please refer to the Chapters 6 – 9 of this Mini Manual for more information.