

## Reviewing and Manually Entering EVV Activities\*in iConnect

#### Introduction

Documentation required in accordance with Appendix A of the iBudget Handbook, shall be entered into iConnect confirming that a service has been rendered. When a service is rendered, the provider must document the service and submit billing documentation in iConnect in accordance with Appendix A. <a href="It is imperative that Agency Owners and/or designated administrative staff">It is imperative that Agency Owners and/or designated administrative staff (using Provider EVV Manager role) review all documentation in iConnect for completeness and correctness prior to billing for services. This guide was created for stakeholders to understand the steps required in reviewing EVV Activities documentation records.

\*EVV Activities are a type of Provider Documentation required for providers who are mandated to use Electronic Visit Verification.

## **Reviewing EVV Activities Documentation Records**

EVV Provider Documentation Activities should be reviewed by accessing the EVV Activities tab in the Provider's record by the Provider EVV Manager.

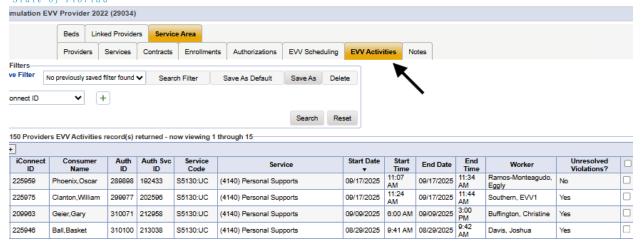
The Provider EVV Manager role allows the user to:

- Verify times of service delivery
- Confirm place of service
- Review GPS data
- Review and edit the service log
- Justify violations
- Change the status to Complete to make the record unable to be edited.
- To review EVV activities, log in to iConnect using the Provider EVV
  Manager role, from My Dashboard, navigate to the Provider's record by
  completing a Quick Search.
  Ensure that the second field contains Providers, the third field contains
  Provider Name and click GO



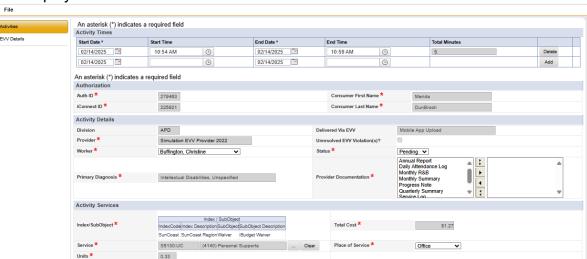
2. In the Provider's record, click on the **EVV Activities Tab**. A list of EVV Documentation records created by EVV workers will be displayed:





3. To open an EVV Activity provider documentation record, **click on the row of the record** that you want to review:

Once the EVV Activity record is open, the specifics of the documentation will be displayed:



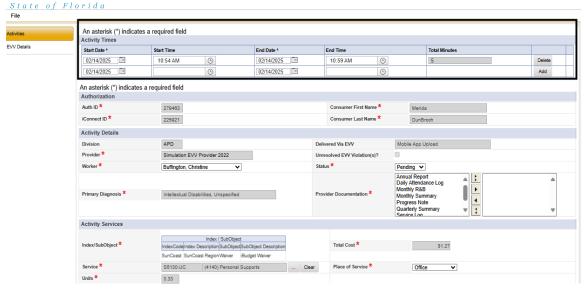
- 4. When reviewing documentation records, review and verify *each* line of the record to ensure accuracy and completeness.
  - Areas are incorrect, and are not greyed out can be edited by the Provider EVV Manager as needed
  - Areas that are greyed out are read-only and cannot be edited

#### a. Under Activity Times:

- First, review the Date and Time(s) of the service.
  - For Personal Supports, Respite, Skilled Respite, Skilled Nursing, & Private Duty Nursing services – verify there is only ONE DATE per record.

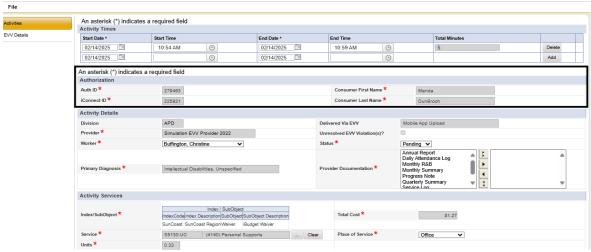
 Provider EVV Managers are able to adjust/edit these times as needed.





## b. **Under Authorization**:

- Auth ID = Next, review the Authorization (Auth) ID to ensure that the correct authorization has been included on the documentation.
  - If the Auth ID is incorrect, the documentation record will need to be deleted and recreated as a Manual EVV activity selecting the correct Auth ID number.
  - Also, ensure that the consumer's iConnect ID number and the consumer's first and last name are correct:

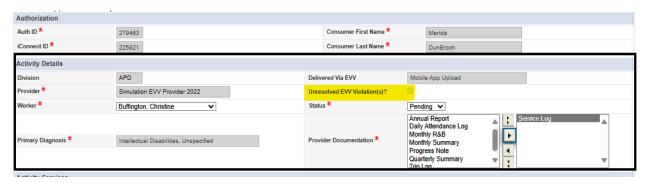


#### c. Under Activity Details:

- Division = APD
- Provider = Provider Agency Name
- Worker = Direct Care Worker's Name
- Delivered Via EVV = Mobile App Upload
- Unresolved EVV Violations(s)? = Will be checked if there are violations on the delivery, or unchecked if no violations occurred
- Status = Pending and will need to be placed in Complete status upon final review



- Provider Documentation =
  - Service Log = Use for Personal Supports, Respite, and Skilled Respite
  - Progress Note = Use for Private Duty Nursing and Skilled Nursing
  - Please refer to the iBudget Handbook for specifics, and always follow the established workflows in manuals and job aids
- Primary Diagnosis = Primary diagnosis will be listed



## d. Under Activity Services:

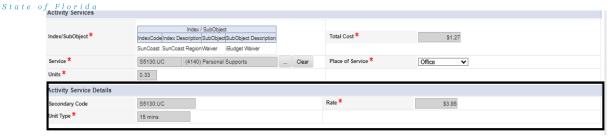
- Index/SubObject = Auto-populates for funding code
- Total Cost =Auto calculates based on the date and times listed on the above activity
- Service = Service Type auto populates (ensure correct service is listed)
- Place of Service = Choose from Home/Office/Other
- Units = Number of units provided, automatically populates based on the times listed above.



# e. Under Activity Service Details:

- Secondary Code = Secondary code will auto populate
- Rate = The established rate will auto-populate based on the service rendered
- Unit Type = Unit type, if applicable, will auto-populate (for example, in minutes)

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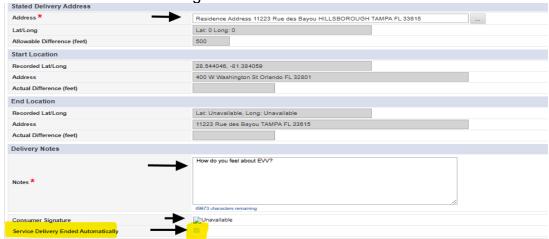


- 5. For Documentation that used Electronic Visit Verification (EVV), Provider EVV Manager will review a separate tab located within the Provider Documentation Record.
  - Go to File > EVV Details



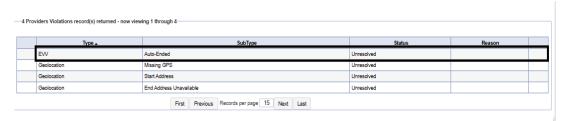
#### Under EVV Details:

- Verify the address information listed is correct and reflects the address at which the delivery was provided.
- Delivery Notes = Review the Service Delivery Log Notes per Handbook Requirements
- Consumer's Signature = If the consumer or the legal representative signed the EVV delivery before the worker uploaded the delivery, it will appear here
- Service Delivery Ended Automatically will be unchecked unless the service was auto-ended after 24 hours. If the service was automatically ended, the box will be checked, and it will need to be justified by the Provider EVV Manager.





- 6. If there are **Violations** listed on the delivery, only the Provider EVV Manager will be able to justify each violation listed at the bottom of the **EVV Details** screen.
  - EVV Violations can be broken down into common types:
    - Manual Entry
    - Service Requires Note
    - Geolocation
      - No GPS
      - Start address is too far from stated address
      - End address is to far from stated address
      - Start address is blank
      - End address is blank
  - a. On EVV Details screen, scroll down to see any Violations listed:

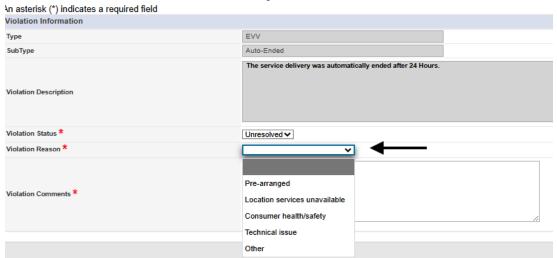


- b. To view the details of the violation, click on each one to open the violation.
  - Type = The violation that has occurred
  - Sub Type = Categorization of the Violation Type
  - Violation Description = Details of the violation
  - Violation Status = Choose from the drop-down menu, Justified or Unjustified (justification is the reason given for the violation)





- Violation Reason = Choose from the drop-down menu the reason for the violation:
  - Pre-arranged = Geolocation violation. Advanced arrangement to meet at a non-approved address
  - Location services unavailable = Geolocation Violation. If the worker did not have location services enabled or there was no internet access due to inclement weather conditions
  - Consumer health and safety = Geolocation violation. When the service is provided at a different location due to consumers health and/or safety
  - Technical issue = When there are technical reasons that may have resulted in the violation, for example, the worker's phone was dropped and broke, so they were not able to end the delivery. This is NOT for lack of internet service
  - Other = Used for any other reason



 Violation Comments = Input the specific details that led to the violation and why it is justifiable. Include any supporting details, such as help desk ticket information. This is a rich text field, which means you have the ability to copy and paste documentation here



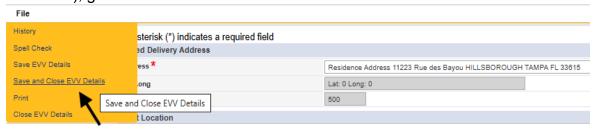
For additional information on troubleshooting issues with the EVV mobile site, please review the Top 4 User Related EVV Errors and EVV Users Errors and Fixes.



7. Once the Provider EVV Manager has reviewed and justified the violation, go to File > Save and Close Violation Detail:



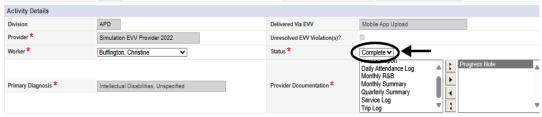
- As needed: Complete each of the steps above for each of the violations listed until <u>all</u> violations have been justified.
- Verify the information for accuracy (opened/reviewed/justified each of the violations), go to File > Save EVV Details:



9. Then navigate back to the **Activities** Sub-page (located under the **File** menu):



- 10. Review the information for accuracy and place the record in a Complete status. Keep in mind that placing the record in a Complete status will make it read-only and it will be unable to be edited.
  - <u>All</u> EVV activities should be reviewed and placed in a **Complete** status prior to billing.



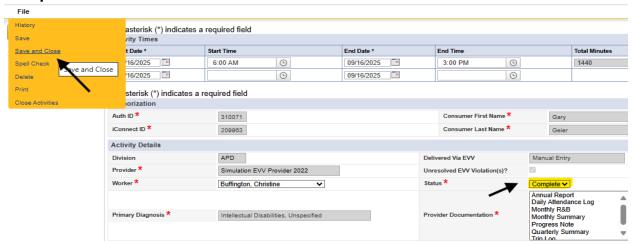
11. Then go to **File > Save and Close** to save any edits/changes:



If the record was placed in a Complete status and additional edits need to be made to the documentation, the Provider EVV Manager role can Reverse the Status Disposition to place the record back in a Pending status to make edits by clicking **File > Reverse Disposition**:



After additional edits have been completed, remember to **change the status back to Complete** and then click **File > Save and Close**:



The Provider EVV Manager role also has the capability to Delete the EVV Activities Provider Documentation from the **File** menu by clicking **Delete**:

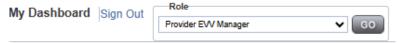


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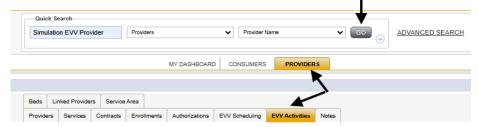
\*There is no option to undelete. Once deleted, the record will no longer exist.

## **Manually Adding an EVV Activity**

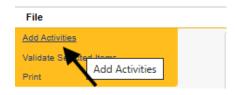
- 1. When an EVV Worker is not able to create an EVV delivery in the EVV mobile site, the Provider EVV Manager can manually add an EVV Activity record:
  - EVV mobile site is offline for system maintenance
  - Cell towers are down due to severe weather or other emergency
  - EVV worker is experiencing login issues
  - a. Make sure that you are in the Provider EVV Manager role, then click GO



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



c. Select File > Add Activities



d. Next, complete the start and end date and time. (Remember there is **ONLY ONE DATE** on the EVV Activity). Click the **Add** button at the end of the row, this will auto calculate the time.

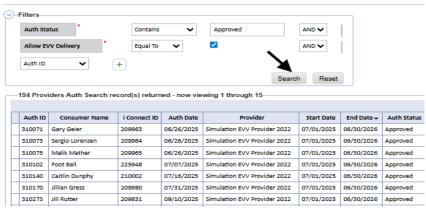




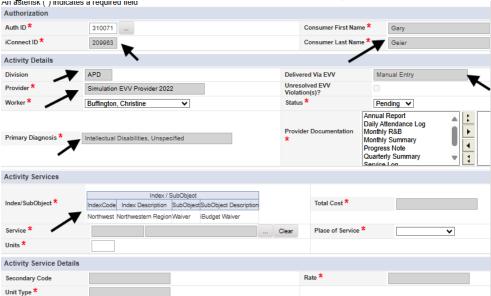
e. Under Authorization, click on the ellipsis (...) to the right of the Auth ID



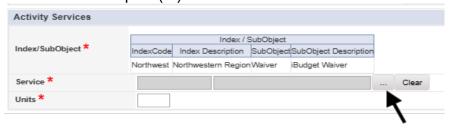
f. In the dialog box will use the filters to search for and select the correct authorization.



g. Once the authorization has been selected, several fields will auto-populate

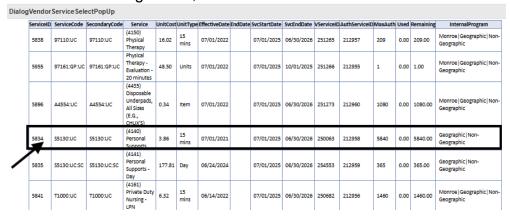


h. Click the ellipsis (...) next to **Service** 

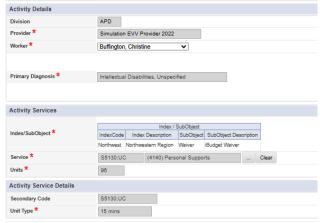




i. From the dialogue box, select the correct service



j. Selecting the service, additional fields auto-populate.



k. Select the **Provider Documentation** under Activity Details by moving the service to the right by utilizing the arrow.



I. Then they will choose from Home, Office, or Other for the Place of Service.



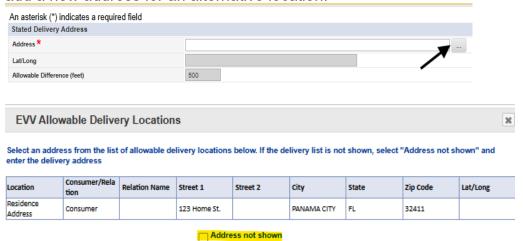
m. Once all fields are populated, select Save from the File menu



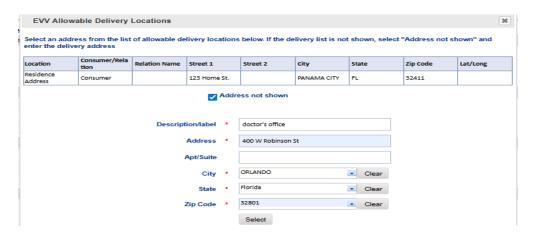
n. Now that the service has been saved, the EVV Details sub-page will appear



o. Enter the address where the service was delivered by using the search ellipsis (...) Choose the approved address from the consumer's record or add a new address for an alternative location.

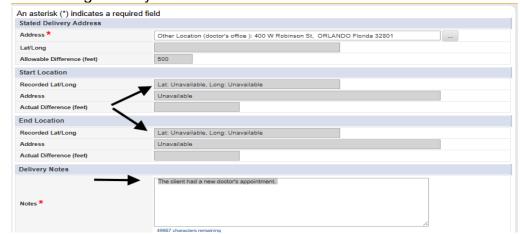


p. If the address does not populate, check the box **Address not shown** and fill in the address where the service was rendered





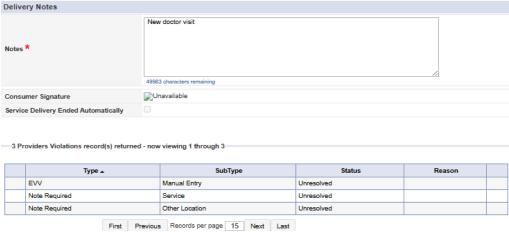
q. Manually entered EVV activities will always have violations since there is no GPS data. This makes the Start and End Locations non-editable. Place the service log delivery information in the **Notes** field



r. Go to File > Save EVV Details to update violations



s. Scroll to the bottom of the EVV Details screen to review violations. Each violation needs to be justified.



Please refer to the <u>Developmental Disabilities Individual Budgeting Waiver Services</u> <u>Coverage and Limitations Handbook</u> for specific documentation requirements.

Additional materials and resources are also located on the iConnect eLearning Library at: <u>iConnect | Waiver (myflorida.com).</u>

Please contact your Regional Trainer if you have questions.