

Registering Users

To authorize staff to use Mobile Visit Verification (MVV), the staff member must be registered as a user in Santrax[®] Payer Management.

- 1. Navigate to the **Staff Security** screen.
- 2. Check the "This staff member can log into the system as a user" checkbox.
- 3. Enter the Staff's initials, create a **Username**, and create a Password. Click **Reset Password** to create a new password.

In Santrax Payer Management

Client v 🤱 Staff v Heyer, Gregory	🕑 Scheduling 🗸 🔰	/ Tracking 🕎 Billing 🗸	🥵 Pa	iyroll 🗸	· 실 '	Reports	2	Help v 🛛 🔄 🚽 🍰 Heyer, Grego 🌾 Logo
Contacts Contacts Contacts Chart Contacts Chart	System Login Pri Fhis Staff Mer * Initials GH Username ghe	vileges nber can log into the syst s syer This User is a System Ad	Rese	t Pass tor.	word			Croup Memberships
- Schedules	Section	Permit	Enable	Add	Edit	Delete		VM Reports Full
- 🕞 Availability - 🗼 Compliance	Billing Billing	Billing Episode Tracker						- Recent Logins
	Billing	Export						Message Timestamp
Payroll	Billing	Invoices					Ξ	1 Successful Login 10/10/2014 11 1 Successful Login 9/17/2014 1:55
G Training	Billing Billing	Master Rates Transfers						1 Successful Login 9/17/2014 1:5: 1 Successful Login 8/18/2014 6:2:
Training	Client	Admission Client						1 Successful Login 8/18/2014 6:18
	Client	Client Attributes						1 Successful Login 8/15/2014 5:48
	Client	Clinical Compliance						1 Successful Login 8/8/2014 2:55: 1 Successful Login 8/7/2014 5:02:
	Client	Export CAHPS Export Oasis						Options Show Only Their Clients
	Client	Oasis Management						
	Client	Physicians						
	Client	Referral Sources					-	
	<u> </u>							1

<u>In MVV</u>

	Sandata MVV Mobile Visit Verification & Point of Care	
REGISTR	TION ID	
3-5953		
USERNAM	ΙE	_
gheye		
PASSWO	D	
	LOG IN	
_		
To res	t the User Name or Password please contact the Agency.	



The Visits & Patients Tabs

- 1. The Staff's schedules are displayed in the Visits tab.
- 2. Clients associated with those schedules are displayed in the **Patients** tab.
- 3. Cancelled schedules are displayed with a strikethrough and cannot be selected.

In Santrax Payer Management

<u>In MVV</u>

🐌 Scheduling: Overview - Mozilla Firefox	≡ Visits	🕱 🔺 LOG OUT	≡ Visits	🕱 🔺 LOG OUT
https://us.sandata.com/Scheduling/Scheduling/Manager.aspx				• • • • • • • • • • • • • • • • • • • •
📁 Client v 🤱 Staff v 🕑 Scheduling v 🕅 Tracking 💠 Billing v 🤱 Payroll v 🍦 Reports 😮 Help v 🛛 💽 🗧 😵 Heyer, Grego 👰 Logout	MV NEXT VISIT		MV NEXT VISIT	
😁 Scheduling: Overview 😽 ClearFilter 🧿 Refresh 🐺 Add 🖕 Print 🗶 Clear				
Search Filters:	You have no scheduled visits at this	stime		
Clenti Date From: 10/10/2014 # + • October 2014 > >>			No Patient Selected	
Saff-I Hever, Gregory ▼ Time Int: (0210/2014 IIII) S M T W T F 5			Choose a Patient and Start a Visit	
Company: Position: Position: Time Out: Company: Company: Com				
Location: Agency: MoTuWeThFrSsSu 12 13 14 15 16 17 18				SEARCH
Admit Type: Service: Santrax Calls Show Selected 19 20 21 22 23 24 25				
Coordinatori V Event V Unassigned 26 27 28 29 30 31 1	VISITS	PATIENTS	VISITS	PATIENTS
Status: ▼ MRN #1 Eliter Exc (lider 3 + 3 + 3 + 7 + 8)				
Primary Payor: Payor #:			DATIFNITO	
Clinical Manageri	Today		PATIENTS	
Starr Manageri	Wednesday, May 04, 2016			
Total Client Hours: 2.00 Total Client Visits: 0 Total Staff Hours: 3.00 Total Staff Visits: 0 As Of: 10/10/2014 12:25:56 PM			Bartlett, Jed	1000008-P1
K (1) M Page size: 100 - 3 items in 1 pages	Bombadil, Tom	12:00 pm - 01:00 pm		
Date Client Chart ID Staff P/T Pos Service EC P/T INP OUTP P/T TZ HrsP IN OUT Hrs Supplies Status PR			Bombadil. Tom	1000007-P1
10/10/14-Fri Bombadil, Tor NE-0000027-PP Heyer, Gregor T HHA AD REG T 12:00 13:00 T E 1 1 1 1 10-Cancelled				
10/10/14-Fri Bartlett, Jed NE-0000056-PP Heyer, Gregoi T HHA AD REG T 14:00 15:00 T E 1 1 0 01-Pending	Bartlett, Jed	02:00 pm - 03:00 pm		1000000 51
10/10/14-Fri Bullfrog, Jærer NE-0000005-PP Heyer, Gregol T HHA AD REG T 16:00 17:00 T E 1 1 0 01- Pending			Bullfrog, Jeremian	1000009-P1
	Bullfrog Jeremiah	04:00 pm - 05:00 pm		
Unit of nome new events start search starts never, oregory scheduling! Overview > Version 6.8.6.1	? (ب	? (ξ 🗘 🗘



Santrax Maintenance

- 1. Unplanned Visits in MVV will appear in Santrax Maintenance as an Unscheduled Event exception.
- 2. Visits in MVV that appear with a strikethrough are canceled visits in Santrax Payer Management.
- 3. Visits entered successfully in MVV will appear without Exception in Santrax Payer Management.
- 4. Visits that start or end too early or late will appear in Santrax Maintenance as they were entered by the MVV user (Staff member). The **Pay Hours** field will show the actual visit duration and may or may not be an exception depending on your agency's rounding rules.
- 5. Overnight Visits in MVV will appear in Santrax Maintenance with a Moon Icon.
- 6. Each device can be tracked using GPS. Since the device should remain in the client's home, if the device is removed from the home when the visit starts or ends, the visit will be flagged as a GPS Distance exception and show a Red GPS icon (). Visits without a GPS Exception will show a Green GPS icon.

📁 Client 🗸	🥵 Staff 🗸 🕗 S	Scheduling 🗸 🥸 Tra	acking 🕤	💡 Billing 🗸 🧏 Pay	yroll 🗸	🖕 Rej	orts 🍣	🗙 Admin 🗸	😲 He	lp 🗸									E- 🕈 🍃	SANDA	TA 🐔 Logo	out
🕘 Santr	ax Maintenance													Clea	r Filter	FVV	9	Refresh	🔽 Update	🍓 Pri	nt 🗙 Clos	se
Search CC CC Adm Ex	Filters Client: Staff: Heyer, Gi ompany: ocation: iit Type: Team: Region: ception: Dayor #:	regory	T T T	420 Coordinator: Position: Service: Event: Status: MRN #:	HH/	A		• • • • •	Hit On Sa Au Hit	de Cano Ily Ever Ily Exce Intrax C Ito Updi de Prior	T celled Ev hts With sptions Clients O ate Sche r Day Vis	Date Fr Date Time Rar vents Calls inly idules sits	om: 10/ To: 10/ nge:	(10/2014		Stat Pend Confi Close Hold In-Pr Cance	tus Le ing irmed ed	gend -	44 4 Su Mo 28 29 5 6 12 13 19 20 26 27 2 3 3 3	Oct 20 Tu We 30 1 7 8 14 15 21 22 28 29 4 5	14 + + Th Fr Sa 2 3 4 9 10 11 16 17 18 23 24 25 30 31 1 6 7 8	
Total Sho	wn: 5																			As 0	f: 10:00 PM	
° <mark>6</mark>	Date	Client	Service	Staff	Pos	Sch Start	Sch End	TZ Sch Hrs	Call (Start E	Call End	Act Hrs	Bill Hrs	Pay Hrs	Supplies	Tasks	P->A	Ovrd	Memo	Exceptions		IsFVV Enabled	1
	10/10/2014 - Fri	Turtle, Leo		Heyer, Gregory	HHA			0.00	13:55	17:54	3.98	3.98	3.98	0	4				Unschedul	ed Event		
	10/10/2014 - Fri	Bombadil, Tom	AD	Heyer, Gregory	нна	12:00	13:00	1.00					-	0				2	No Show E	ception		
	10/10/2014 - Fri	Bartlett, Jed	AD	Heyer, Gregory	HHA	14:00	15:00	1.00	13:59 1	14:55	0.93	0.93	0.93	0	4			3				
	10/10/2014 - Fri	Bullfrog, Jeremiah	AD	Heyer, Gregory	HHA	16:00	17:00	1.00	16:00 1	16:41	0.68	0.68	0.68	0	4							
3	10/10/2014 - Fri	Denver, Jane	AD	Augusthy, Jovise	HHA	20:00	09:00	M 13.00				-	-	0				5				
Go To:	Home Santra	Maintenance																		•	Version 6.8	.7

Proprietary and Confidential. Copyright © 2016 Sandata Technologies, LLC. All rights reserved CT DSS MVV in Santrax Payer Management.docx



Worker Notes & Health Assessment

Worker Notes and Health Assessment answers that are entered in MVV are saved in the Task Notes – Schedules screen. From the Schedule Detail Screen, click the "Sticky Note" Icon to open the Task Notes – Schedules screen.

Edit Schedule Webpage Dialog				22	
https://us.sandata.com/Scheduling/AddEc	ditSchedule.aspx?schedID=1280	18:8#=3.98		-	
Schedule Detail					
General Documents:0	Call Log:4 STasks:	•			
Date: 10/10/2014	🍯 Task Notes - Windows Inte	ernet Explorer			
Service:	👩 https://us.sandata.com/g	lobal/Notes.aspx?Parent=Schedules&Par	entId=12801&AdId=8545&StaffI	d=420&ShowClientNot	es=False&Shov 🔒
Company: ABC Compa					
Location: North East	Task Notes - Sci	hedules			Add 🍖 Print
Shift Group: North East N	Type:	WVN Worker Visit Note	•		
PoS Direction: O To	Include Completed:				
-Event Code(s)					
REG- Regular	Туре	Note	Created	Creator	Completed
	Worker Visit Note	Worker Note	02/06/2015 16:29:42	Augusthy, Jovise	No
Comments	Health Assessment	1. Did the member experience	a 07/15/2016 12:17:33	Docs, Greg	No
- Clients					
Turtle, Leo - NE0000051-CON					
Turtis Leo					
Plante, ceo					
Event Type					
Staff					
Heyer, Gregory - 00000520-HH					
Heyer, Gregory					
Event Type					
				Sale of the second s	_
0	Save	Close			



Notes by Category Report

Use the **Notes by Category** report to review the Member Health Assessment questions and answers.

Attached To	Client	Staff	Entity	Note Text	Completed
Notes Categ	ory: Health Assess	ment			
Schedules	Robertson, Robert	Docs, Greg	Schedule - 07/15/2016	1. Did the member experience any falls during this shift?	No
				Yes a. If yes, did it result in injury? No	
				2. Did you notice any changes in the member that concern you?	
				No	
				3. Did the member have any visitors during this shift?	
				No	
				4. Did the member have any health appointments during this shift?	
				No	
				5. Did the member do anything outside the home (not counting health appointments) during this shift?	
				Yes	
				a. It yes, please explain: Walk around the block	
				6. Has the member had an Emergency Room/hospital visit since the last time provider was present?	
				No - Docs, Greg 07/15/2016 12:17	
Total Numbe	r of Health Assess	ment : 1			
Notos By Ca	10.000 /			7/19/2016 12:41:57PM	Page 1 of 1



FAQ

- Q. How do I generate claims for MVV visits?
- A. For MVV visits, once the visits are sent to Santrax Payer Management and Confirmed, the visits can be exported and billed using the same procedure used for visits using telephony.
- Q. What if the Attendant clocks in or out too many times?
- A. Each visit in MVV automatically pairs the start and end times to the schedule as entered by the MVV User (Staff member). If an extra visit is started, it must end before another visit can start. Any extra visits will need to be reconciled in Santrax Maintenance.
- Q. What if a visit shows with an Unknown Client or Unknown Staff exception?
- A. MVV visits will never have an Unknown Client or Unknown Staff exception. In Santrax Maintenance, for MVV visits, the MVV User (Staff member) logged in is always shown in the Staff field and the client selected is always shown in the Client field.
- Q. What if a Staff member forgets to use the MVV app and calls in using the telephone?
- A. If the staff member starts the visit with a telephony call, the staff member has two options:
 - 1. The staff member can immediately (within 5 minutes) start the visit in MVV and conduct the rest of the visit as normal. Santrax Maintenance will retain the extra visit start time for informational purposes, but will show the correct times on the visit line.
 - 2. The Staff member can conduct the rest of the visit and then at the end of the visit, start the visit in MVV and immediately (within 5 minutes) end the visit in MVV. Santrax Maintenance will retain the extra visit end time for information purposes, but will show the correct times on the visit line.
 - 3. The Staff member can call out using the telephone at the end of the visit (not using the device). Santrax maintenance will accept both Telephony calls.

Q. Can MVV do Split Shift visits?

A. Split Shifts (visits that require more than one service that must be billed separately) can be completed in MVV as long as each service is scheduled separately and those schedules do not overlap.

	Staff Manage						1												
	Total Client Ho	urs: 1. 0 Tot	al Client Visits: 0 1	Total Staff Hours	: 1.00 Tot	al Staff	isits: 0										As Of:	10/13/	2014 3:47:42 PM
		Pag	e size: 100 🔻						1									:	2 items in 1 pages
	Date	Client	Chart ID	Staff	P/T Pos	Service	EC	P/T	INP	OUTP	P/T 1	Z Hr	sP II	и оит	Hrs	Supplies	Status	PRN	Comments
[10/13/14-Mon	Bartlett, Jed	NE-0000056-PP	Heyer, Gregor	т нна	AD	REG	т	16:00	16:30	ТЕ	0.	5		0.5	0	01- Pending		
	10/13/14-Mon	Bartlett, Jed	NE-0000056-PP	Heyer, Gregor	т нна	PT	REG	т	16:30	17:00	ТЕ	0.	5		0.5	0	01- Pending		



Accessing GPS Maps via...

GPS maps are used to confirm the location of caregivers using a Mobile Visit Verification (MVV) device when providing services. There are two ways to access GPS Maps.

Santrax[®] Payer Management

Click Scheduling > Santrax > GPS Map

🕘 Scheduling 🐱 📎	Tracking	😚 Billing 🗸	🕺 Payroll 🗸	R
New Events				
🚯 Confirmation				-
× Santrax	>	💥 Mainten	ance	
PV Townstone	>	GPS Mar	0	

Santrax Maintenance

Access the map directly from your Maintenance screen. Click the GPS Icon to open the GPS Map view.

GPS Icon Legend

- Coordinates matched
- Coordinates not matched
- Unknown coordinates

In Santrax Payer Management

04727/16-We 014 , Franklir 55125 , Snawn HHA 07:50 08:00 0.50 06:22 06:23 0.02 0.03 0.03	2	0
a 04/27/16-We 014 Franklin S5125 Shawn HHA 09:30 10:00 0.50 08:42 08:52 0.17 0.25 0.25	3	0



GPS Map

Map Filters

The GPS Map screen allows you to filter your map information by:

- Status: Scheduled, GPS Exception, No GPS Exception, In Progress
- Visit: Exact visit with patient and employee
- Visit Date: All visits for selected date
- Employee: All visits by a specific employee
- Client: All visits by a specific patient

GPS Map Filters	
Visit Filters	
Status	
No GPS Exception	-
Visit	
Select	
Employee Filters	
First Name	
Last Name	
Phone Number	
Client Filters	
First Name	
Last Name	
Phone Number	
Branch	
Select	-
Supervisor	
Select	



Visit Information



Employee Information

nplo	yee Information					
¥	Name	Date/Time	Status	Lat/Lon	Contact Number	Address
1	Vicky Turk	04/29/2016 11:27 AM	1	40.810840/-73.663970		
2	AJ Simpson	04/29/2016 11:58 AM	1	40.842647/-73.320154		
3	Roger Thompson	04/29/2016 12:06 PM	1	40.842643/-73.320140		

Client Information

¥	Name	Lat/Lon	Visit Start Time	Visit End Time	Call In	Call Out	Contact Number	Employee Details	Address
	Clientoffone Nancy	41.12853280/-81.61154130	04/29/2016 8:39 AM	04/29/2016 12:00 AM	04/29/2016 8:39 AM		(999) 999- 9999	Nancy Brothers; 1801234567; ; ; ;	3040 West Market Street, Akron, OH, 44333
2	Clienthm Lisak	35.96005040/-86.87496260	04/29/2016 9:19 AM	04/29/2016 12:00 AM	04/29/2016 9:19 AM		(999) 999- 9999	Mark Naghsh; 1120123456; ; ; ;	304 Stanley Park Lane, Franklin, TN, 37069
Ļ	Joey James	40.81072480/-73.66356730000001	04/29/2016 11:27 AM	04/29/2016 12:00 AM	04/29/2016 11:27 AM		(999) 999- 9999	Vicky Turk; 1301234567; ; ; ;	26 Harbor Park Drive, Port Washington, NY, 11050