



**Gordan Jacobs**™  
EVV SERVICE BUREAU

EVV Management Service Solution  
— Detailed Overview



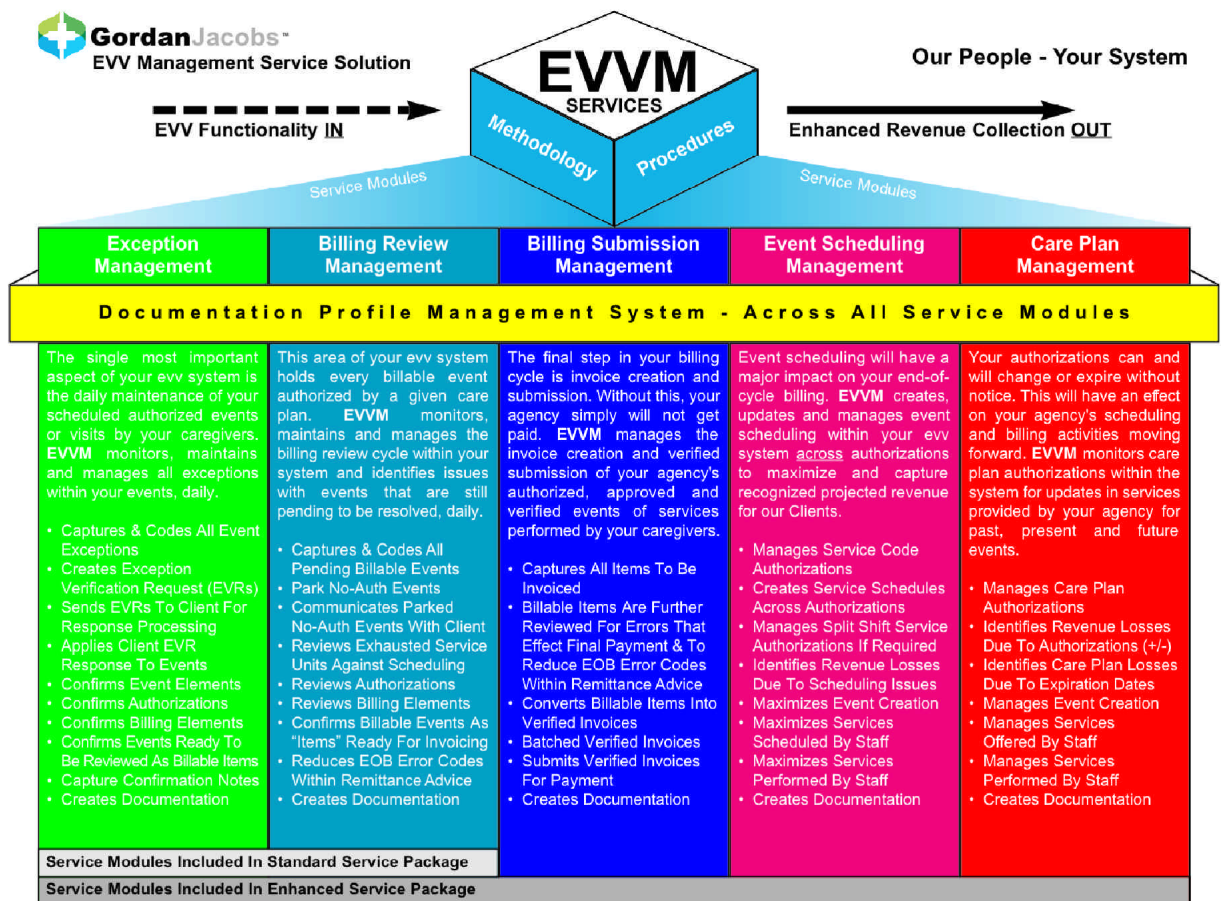
## EVV Management Service Solution - Detailed Overview

The **GordanJacobs™** Firm has developed a powerful service solution to assist the Home Health Service Providers with the daily maintenance and management of their evv system platform throughout the USA.

### Our People - Your System

The EVV Management (EVVM) Service Solution was developed to work in "**conjunction**" with the functionality of the evv system to protect and enhance revenue collection. Our people, remotely, maintaining and managing your evv system daily through our exclusive EVVM Service Modules. We pay close attention to every detail within every event that impacts the billing process and your revenue.

The EVVM Service is an outsource solution containing five (5) Service Modules that manages core evv functionality (**IN**) through our methodology procedures (**OUT**) to protect and enhance your revenue collection while creating accurate system documentation.



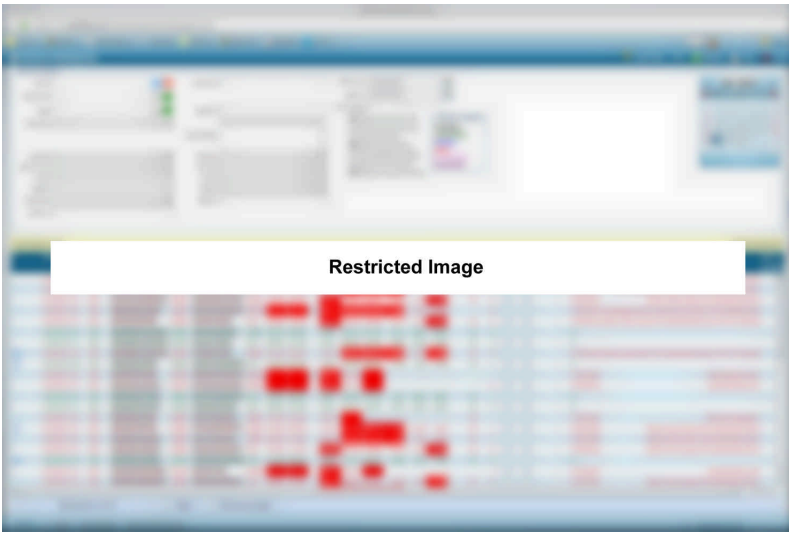
Enlarged view on page 11 herein.

This EVVM Service Solution Detailed Overview was developed to outline each Service Module performed for agency clients of the **GordanJacobs™** Firm utilizing the EVV Management Service Solution. The modules outlined herein cover critical daily functions required to reduce operational cost and increase revenue collection with the use of your evv systems platform.

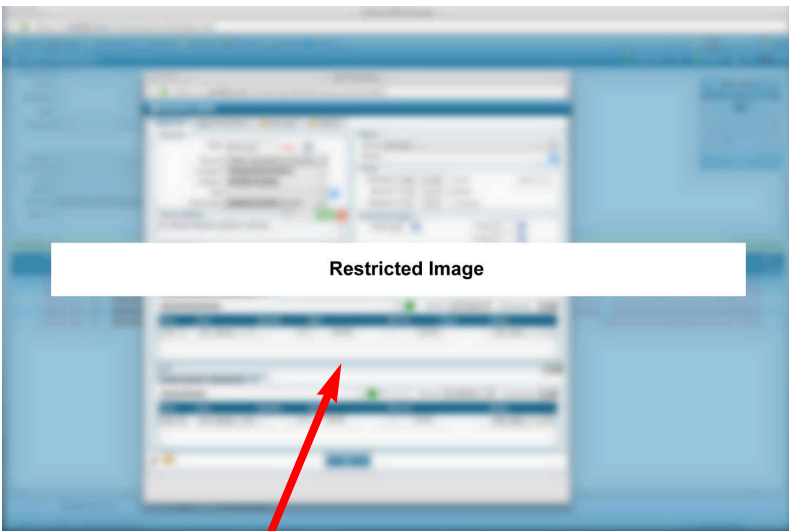
The **GordanJacobs™** Firm is not affiliated nor associated with Sandata Technologies, Inc. Any such relationship or association is not intended nor implied.

The services covered by the **GordanJacobs™** Firm, EVVM Services are defined in detail within five (5) Service Modules:





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Example: Exception Verification Request (EVR) form above used within our Exception Verification System to document exception correction.

## 1. Exception Management Service Module

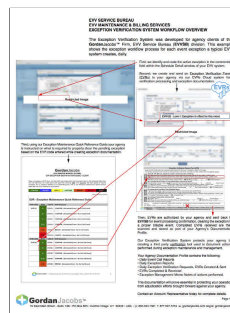
The single most important aspect of your evv system is the daily maintenance of your scheduled authorized events or visits by your caregivers. Additionally this will be the area within the evv system where revenue loss is generated. Your care plan authorizations are now set to a “not to exceed” method for daily scheduling and billing. Provider service code units are set to be dispensed daily, Sunday to Saturday. Should you have a caregiver call out for a scheduled authorized visit you will need to reschedule this event during the current week or that service authorization will be exhausted.

Additionally, even when your caregiver successfully clocks IN and OUT of the evv system and has entered all of the appropriate tasks at the end of the visit, the evv system may still flag the event as an “exception”. ALL system exceptions, viewed in **RED**, will need to be managed properly and converted to confirmed, viewed in **GREEN**, in order to proceed to billing process.

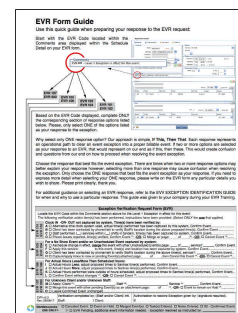
Our Exception Management Module monitors, maintains and manages all exceptions within your Event Maintenance window, daily. We capture and code each exception both electronically and in paper trail format. We create an Exception Verification Request (EVR) form and send it on to our Client for verification response and processing. We then apply EVR responses received to each event. Our Exception Management module confirms all event elements, confirms service authorizations and confirms all billing elements thus confirming each event is complete and proper to be reviewed as a billable item. Our module also captures the detailed confirmation notes and creates historical documentation on each event we service.

Our EVM Service Solution is your agency's main line of defense against forthcoming adjudication risk liabilities and compliance liabilities that have yet to be announced by your state agency.

For a more detailed view on our Exception Verification Request process, review the EVR Process Workflow Overview and our EVR Form Guide within.



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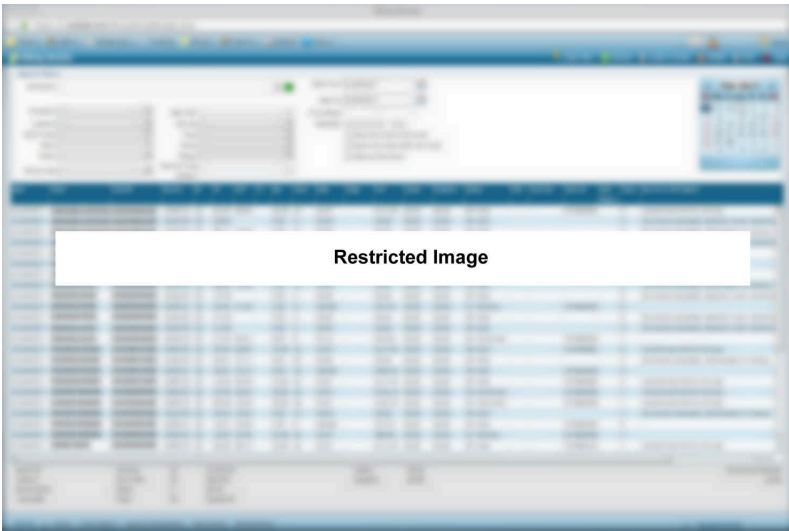


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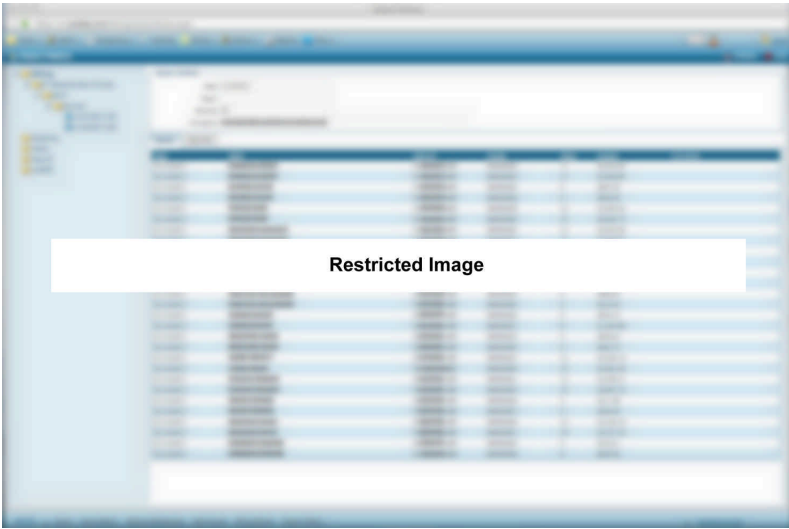


### 2. Billing Review Management Service Module

Of equal importance to Exception Management module above is our Billing Review Management module. This area of your evv system holds every billable event authorized by a given care plan. This is where the authorized billing documentation is generated and passed off to MMIS contractor electronically for payment processing. Your evv system can create several if not hundreds of billable events daily. They all need to be checked for possible issues before proper billing submission can occur.

Our Billing Review Management Module monitors, maintains and manages the billing review cycle within your evv system and identifies issues with events that are still pending to be resolved. Here is where we track and protect your trending revenue against your

anticipated revenue projections. We capture and code all pending billable events. We park no-authorization events and communicate parked no-authorization events with our Client. We further review all exhausted service units across current event scheduling, review all pending authorizations and confirms the review process of pending billable events as "items" ready for invoice creation and submission by Client. This will reduce EOB error codes found within the remittance advice. Again, our module captures all the detailed notes and creates historical documentation on each event we service. We work very close with your operation in resolving open issues so your agency can meet expected revenue collection.



### 3. Billing Submission Management Service Module

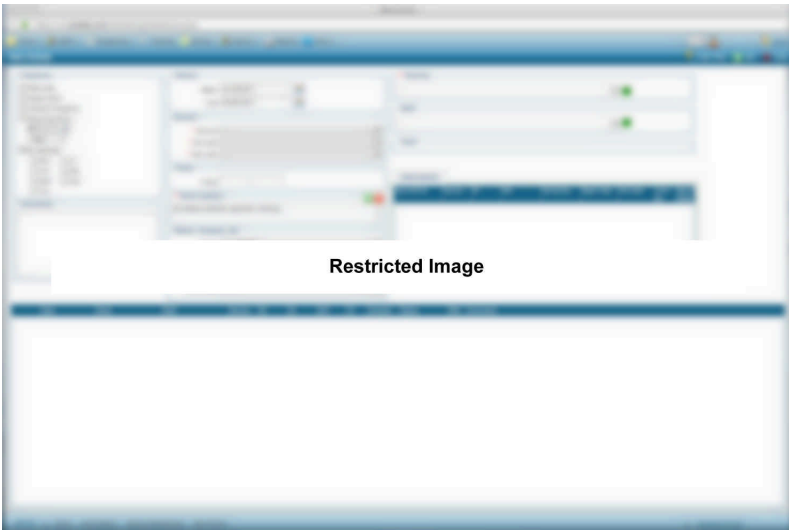
The final step in your billing cycle is invoice creation and submission. Without this, your agency simply will not get paid. After the above mentioned Service Modules have been properly completed by our EVVM Services, your agency is ready to generate invoices for services rendered.

Our Billing Submission Management Module monitors and manages the invoice creation of items ready to be billed for services performed by your caregivers. These billable items are further passed through our extensive review process to double check for possible errors that could effect final payment thus, reducing the risk of EOB error codes generated within the remittance advice received. We then gather all billable items ready to be invoiced within claim cycle param-

eters and convert items ok to bill into "verified" invoices, batch verified invoices and submit these invoices for payment onto the appropriate payor electronically for payment processing within your normal billing cycle for our Clients. Again, our module captures all the detailed notes and creates historical documentation on each event we service.





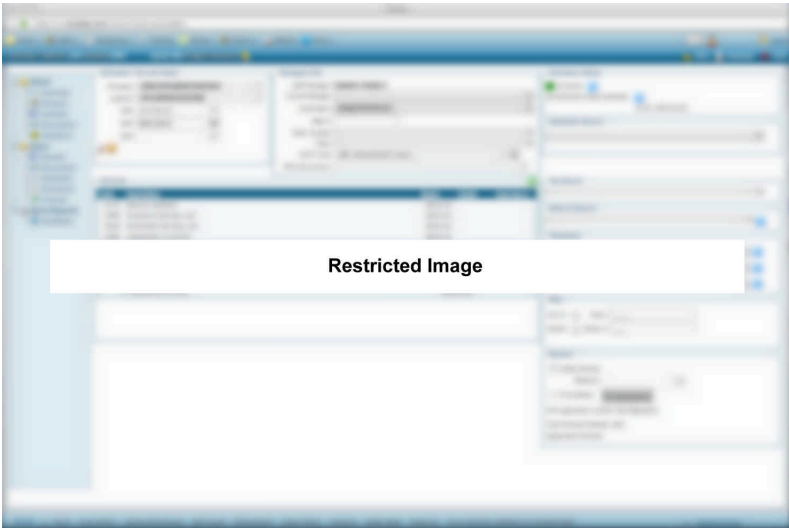


#### 4. Event Scheduling Management Service Module

A “perfect world” would be a system where a schedule is created, validated and authorized through an electronic care plan and the caregiver arrives at the consumers location where the visit and service performed are verified. In reality, when dealing with “people” and “systems”, getting to that end result is far more complicated. Schedules change, people arrive early or late, people call out, and yes, the system creates glitches. All of these “life issues” will effect the original scheduled event and will have a major impact on your end-of-cycle billing.

Our Event Scheduling Management Module creates, updates and manages event scheduling within your evv system across your authorizations to maximize and capture recognized projected revenue for your

operation. We manage service code authorizations and split shift service authorizations, if required. Our service module identifies revenue losses due to scheduling issues. Moreover, this module maximizes event creation, maximizes services scheduled by staff as well as services performed by staff. Additionally, we create the all detailed notes and create historical documentation on each schedule we service.



#### 5. Care Plan Management Service Module

(from a system perspective) Since the implementation of electronic care plans are now submitted electronically, to reside within the back end of your agency's evv system, the care plan management from the state to the provider is now seamless. Care plans can now be updated in real- time (24 hours) and passed onto the provider without notice. Your authorizations can change or expire without notice to your agency. This will have an effect on your agency's scheduling and billing activities moving forward.

Our Care Plan Management Module monitors care plans within the system for expiration and/or changes services provided by your agency onto the consumer. This module also validates services authorized across scheduling to identify and verify any exhausted

services scheduled or provided for past, present and future events. We also manage all your care plan authorizations to identify potential revenue gains or losses due to authorization changes. We validate care plan expiration dates and manage event creation of services offered and performed by staff.



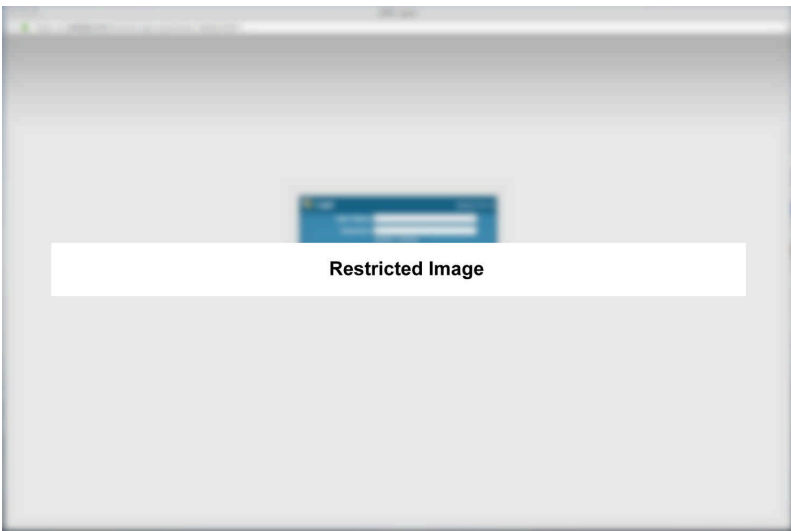


### Documentation Profile Management System

All Service Modules performed by the **GordanJacobs™** Firm include our Documentation Profile Management System. This system creates a documentation profile, system-wide, of operational maintenance outside your evv system of services performed as well as verification documentation used in event exception management performed within your evv system. Documentation is provided to our Client via our **Cloud** system, a secure FTP (File Transfer Protocol) account created for our Client as part of our Service Agreement. The documentation created for Client's Documentation Profile is as follows:

- a. Daily Event Call Report(s): This is a daily snapshot of all system events created within Clients EVV System.
- b. Daily Event Exception Report(s): This a daily snapshot of all system event exceptions created within Clients EVV System.
- c. Daily Exception Verification Request Form(s), (EVRs): This contains the daily EVRs created by GordanJacobs and presented to Client for verification purposes.
- d. Daily Exception Verification Request Forms Received: This contains the daily EVRs received by Client and presented back to GordanJacobs for event exception management purposes. These files contain the verification action items received and performed.
- e. Billing Reports: This contains Billing Summary Reports of billing activity performed and posted by GordanJacobs through Client's EVV System.
- f. Pending Events: This contains any pending events that are on hold awaiting authorization or additional information required to clear event exception.
- g. Client Upload Directory: Here is where our Clients return completed EVR responses and supply any additional servicing documentation that may be needed.

Daily Event Call Report, Daily Event Exception Report and Exception Verification Request (EVRs) forms are created electronically in encrypted .PDF format and made available daily M-F via the EVVMs Cloud system. Service workflow and documentation flow were designed to be seamless between your agency and our service bureau operation.



### Service Portal Definition:

The **GordanJacobs™** Firm functions its maintenance and management service modules through a Service Portal. Our highly trained staff monitors and manages your evv system remotely through the evv system login privileges function. A staff account is created for the **GordanJacobs™** Firm on your evv system with unique permissions. All of our work is tracked and documented within your very own evv system. Your agency will have complete oversight to the maintenance and management functions we perform for your organization. One of the many benefits our EVVM Service Solution offers your agency is no need to hire and support dedicated internal staff to function your evv system. Your operation will utilize our team of trained evv experts working your system remotely from our service bureau.



# Will you allow the **GordanJacobs™** Firm to manage Your EVV system?

Many agencies across the country are considering that very question. We have the experience, technical expertise and system contacts to help your organization succeed with the evv platform.



## **MORE** Than Just Technical Support!

To successfully function your evv system, providers will need more than just technical support from the evv system vendor(s) to maintain expected revenue collection from their billing activities moving forward. Only proper event maintenance and management procedures will allow your operation to maintain the expected revenue captured and received by your evv system. This is where our experience and knowledge of evv systems shine for our clients. Technical support does not equate into client service. Our view of “Client Service” goes above and beyond just technical support. We offer a team approach with a focus on your business, as a

whole. Our Client Service makes your evv system manageable, affordable and work for you like no other vendor could.

## **Here** For Your Financial Interest

When a problem arises, outside of evv system functionality, with regard to a claim, whom would you call? More importantly, what would you say to address the problem? Problems with claims happen. Our clients call upon our experience in claims processing to identify what happened to the claim and how to best resolve the issue, quickly. Based on the situation, we identify the issue and direct you as to whom you would need to contact regarding the claim and what are the elements of the claim that need to be addressed. We process hundreds of claims daily and we have, for the most part, seen it all.

**Most importantly**, we work for you and only **YOU!** Our Firm is the one point of contact within the process, from the payor through the evv system vendor onto your operation, that works solely for your financial interest.

## Maximize Revenue Efficiencies

Once your operation becomes a client of the **GordanJacobs™** Firm, we begin to manage your event exceptions and we look for patterns. Every client we serve has a unique pattern that will ultimately effect the revenue collection within their evv system. With our experience with working with several different types of provider clients, based on your particular system pattern, we fine-tune your system to capture as much revenue your authorizations will allow. Bottom line here is, your internal staff will not have the experience of multiple client evv systems to benefit and adjust your evv operation.

Get more out of your evv system, get **GordanJacobs™!**



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## Detail, Detail, Detail...



Our staff is trained to identify every detail that effects the revenue collection of your operation. We know what to look for with regard to final payment for services performed from every event created within your evv system. Our exception verification process was developed to benefit our clients by our experienced staff maintaining every event and managing every exception within your evv system into proper billable events, ready for billing.

**Question:** Does your internal staff have an effective process in place that focuses proper attention to each detail of an event that ultimately affects the billing process?

Most of our clients have spent all of their time between billing cycles just getting the invoice and billing process completed by deadline. Not much time was available to focus on the details that have effected their collectable revenue. This is the main reason we're able to increase collectable revenue in most cases for our clients.

## How Complicated Is Outsourcing Your EVV System? —Simple!

Simply put, not complicated at all. If you can print, sort, scan and send, then your evv system will be in the hands of the experts via our **Cloud** system. It's just that simple.



Our approach within our EVV Management Service Solution is really quite simple: [— If This, Then That—]. We train your staff on how to interact within our management solution. Complete and confident training of your staff will take less than 30 minutes. Plus, all clients receive an EVVM Client Operational Manual that covers all of the functional aspects we perform within our service solution. One dedicated point-of-contact is all that will be required from your operation to fully interact with our people managing your evv system.

The **GordanJacobs™** Firm EVV Service Bureau was established to be a world-class service provider in the evv system space. Our proven maintenance and management methodologies coupled with our effective control systems and with a highly trained staff ensures a seamless outsourcing experience for your evv system operational needs.

Contact an Account Representative for complete details on how to engage our EVV Management Service Solution for your business today.

## Your System - Our People Our EVVM Service Modules



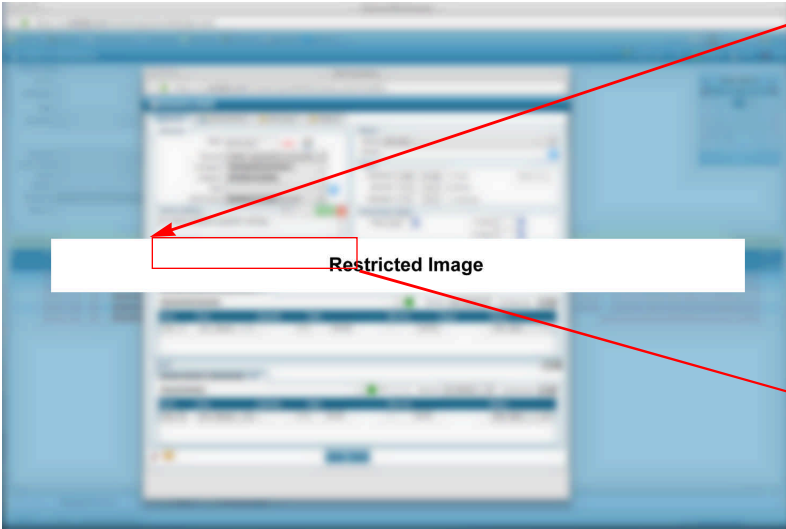
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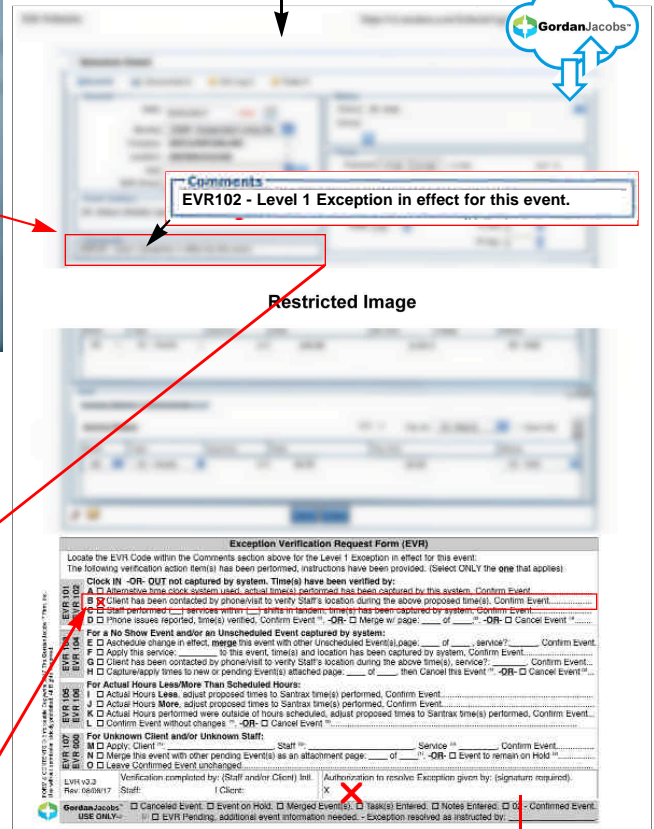
# EVV SERVICE BUREAU EVV MANAGEMENT SERVICE EXCEPTION MANAGEMENT MODULE - WORKFLOW OVERVIEW

Our Exception Management Service Module was developed for agency clients of the **GordanJacobs™** Firm, EVV Service Bureau division. This example shows the exception workflow process for each event exception a typical evv system creates, daily.



First: we identify and code the active exception in the comments field within the Schedule Detail window of your EVV system.

Second: we create and send an Exception Verification Request form (EVRs) to your agency via our EVMs Cloud system for verification processing and exception documentation.



Third: using our Exception Maintenance Quick Reference Guide your agency is instructed on what is required to properly clear the pending exception based on the EVR code entered while creating exception documentation.

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EVR EXCEPTION IDENTIFICATION GUIDE - CLIENT

When completing an EVR form, find the EVR code listed within the Comments field on the Schedule Detail then find the matching EVR Code below and select the following **ONE** EVR response that best applies to resolve exception. For a complete definition of an EVR Response, refer to the Exception Maintenance Detail sections listed after the Quick Reference Guide below.

CONFIRM     ADJUST     APPLY     CAPTURE     MERGE     CANCEL     STOP

EVR CODE	ROW	CSN ID	EVR Response:
EVR101	A	CS101.1	CONFIRM - [Scheduled Event - No In Call Event]
	B	CS101.2	CONFIRM - [Scheduled Event - No In Call Event]
	C	CS101.3	CONFIRM - [Scheduled Event - No In Call Event]
	D (1)	CS101.4	CONFIRM - [Scheduled Event - No In Call Event]
	D (2)	CS101.5	MERGE - [Scheduled Event - No In Call Event]
EVR102	A	CS102.1	CONFIRM - [Scheduled Event - No Out Call Event]
	B	CS102.2	CONFIRM - [Scheduled Event - No Out Call Event]
	C	CS102.3	CONFIRM - [Scheduled Event - No Out Call Event]
	D (1)	CS102.4	CONFIRM - [Scheduled Event - No Out Call Event]
	D (2)	CS102.5	MERGE - [Scheduled Event - No Out Call Event]

**EVR - Exception Maintenance Quick Reference Guide**

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Then, EVRs are authorized by your agency and sent back to us for event processing confirmation, clearing the exception to a proper billable event. Completed EVRs received are then scanned and stored as part of your Agency's Documentation Profile.

Our Exception Verification Management Services protects your agency by creating a third party verification tool used to document actions performed during exception maintenance and management.

Your Documentation Profile contains the following:

- Daily Event Call Reports
- Daily Exception Reports
- Daily Exception Verification Requests, EVRs Created & Sent
- EVRs Completed & Received
- Exception Management Memo Notes of actions performed.

This documentation will prove essential in protecting your operation from adjudication efforts brought forward against your agency.

Contact an Account Representative today for complete details.



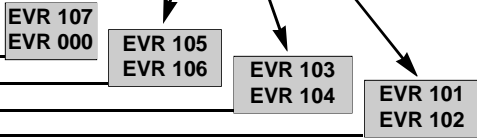
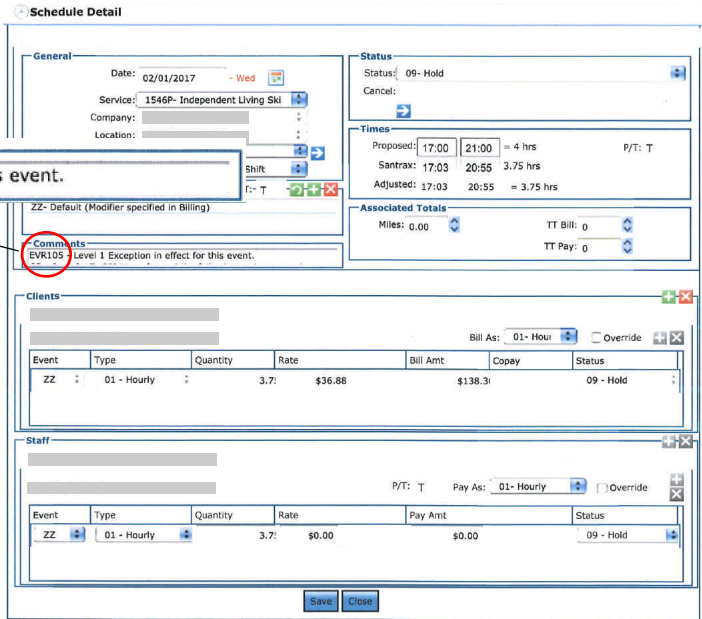
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# EVR Form Guide

Use this quick guide when preparing your response to the EVR request:

Start with the EVR Code located within the Comments area displayed within the Schedule Detail on your EVR form.



Based on the EVR Code displayed, complete ONLY the corresponding section of response options listed below. Please, only select ONE of the options listed as your response to the exception.

Why select only ONE response option? Our approach is simple, **If This, Then That**. Each response represents an operational path to clear an event exception into a proper billable event. If two or more options are selected as your response to an EVR, that would represent on our end as if this, then these. This would create confusion and questions from our end on how to proceed when resolving the event exception.

Choose the response that best fits the event exception. There are times when two or more response options may better explain your response however, selecting more than one response may cause confusion when resolving the exception. Only choose the ONE response that best fits the event exception as your response. If you need to express more detail when selecting your ONE response, please write on the EVR form any particular details you wish to share. Please print clearly, thank you.

For additional guidance on selecting an EVR response, refer to the EVV EXCEPTION IDENTIFICATION GUIDE for when and why to use a particular response. This guide was given to your company during your EVR Training.

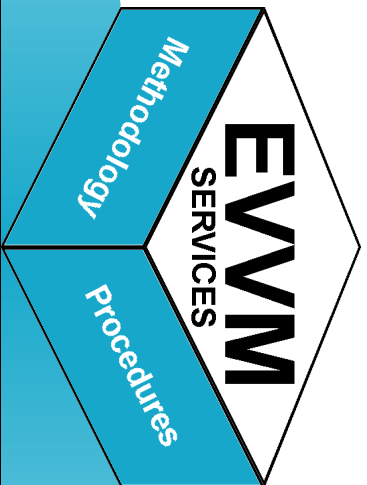
Exception Verification Request Form (EVR)		
Locate the EVR Code within the Comments section above for the Level 1 Exception in effect for this event: The following verification action item(s) has been performed, instructions have been provided. (Select ONLY the <b>one</b> that applies)		
EVR 101 EVR 102	<b>Clock IN -OR- QUIT not captured by system. Time(s) have been verified by:</b>	
	A <input type="checkbox"/> Alternative time clock system used, actual time(s) performed has been captured by this system, Confirm Event.....	
	B <input type="checkbox"/> Client has been contacted by phone/visit to verify Staff's location during the above proposed time(s), Confirm Event.....	
	C <input type="checkbox"/> Staff performed ( ) services within ( ) shifts in tandem, time(s) has been captured by system, Confirm Event.....	
D <input type="checkbox"/> Phone issues reported, time(s) verified, Confirm Event <sup>(1)</sup> . <b>-OR-</b> <input type="checkbox"/> Merge w/ page: ___ of ___, <sup>(2)</sup> . <b>-OR-</b> <input type="checkbox"/> Cancel Event <sup>(3)</sup> .....		
EVR 103 EVR 104	<b>For a No Show Event and/or an Unscheduled Event captured by system:</b>	
	E <input type="checkbox"/> Aschedule change in effect, <b>merge</b> this event with other Unscheduled Event(s),page: ___ of ___, service?: ____, Confirm Event.....	
	F <input type="checkbox"/> Apply this service: _____ to this event, time(s) and location has been captured by system, Confirm Event.....	
	G <input type="checkbox"/> Client has been contacted by phone/visit to verify Staff's location during the above time(s), service?: _____. Confirm Event...	
H <input type="checkbox"/> Capture/apply times to new or pending Event(s) attached page: ___ of ___, then Cancel this Event <sup>(1)</sup> . <b>-OR-</b> <input type="checkbox"/> Cancel Event <sup>(2)</sup> ...		
EVR 105 EVR 106	<b>For Actual Hours Less/More Than Scheduled Hours:</b>	
	I <input type="checkbox"/> Actual Hours <b>Less</b> , adjust proposed times to Santrax time(s) performed, Confirm Event.....	
	J <input type="checkbox"/> Actual Hours <b>More</b> , adjust proposed times to Santrax time(s) performed, Confirm Event.....	
	K <input type="checkbox"/> Actual Hours performed were outside of hours scheduled, adjust proposed times to Santrax time(s) performed, Confirm Event...	
L <input type="checkbox"/> Confirm Event without changes <sup>(1)</sup> . <b>-OR-</b> <input type="checkbox"/> Cancel Event <sup>(2)</sup> .....		
EVR 107 EVR 000	<b>For Unknown Client and/or Unknown Staff -OR- Confirmed Event:</b>	
	M <input type="checkbox"/> Apply; Client <sup>(1)</sup> : _____, Staff <sup>(2)</sup> : _____, Service <sup>(3)</sup> _____, Confirm Event.....	
	N <input type="checkbox"/> Merge this event with other pending Event(s) as an attachment page: ___ of ___. <b>-OR-</b> <input type="checkbox"/> Event to remain on Hold <sup>(2)</sup> .....	
O <input type="checkbox"/> Leave Confirmed Event unchanged <sup>(1)</sup> . <b>-OR-</b> <input type="checkbox"/> Event to be Canceled <sup>(2)</sup> .....		
EVR v3.4 Rev: 10/18/17	Verification completed by: (Staff and/or Client) Intl. Staff: _____   Client: _____	Authorization to resolve Exception given by: (signature required). X _____
<b>Gordan Jacobs™</b> <input type="checkbox"/> Canceled Event. <input type="checkbox"/> Event on Hold. <input type="checkbox"/> Merged Event(s). <input type="checkbox"/> Task(s) Entered. <input type="checkbox"/> Notes Entered. <input type="checkbox"/> 02 - Confirmed Event. USE ONLY → <input type="checkbox"/> EVR Pending, additional event information needed. - Exception resolved as instructed by: _____		





EVV Functionality IN

Service Modules



Enhanced Revenue Collection OUT

Service Modules

**Exception Management**

**Billing Review Management**

**Billing Submission Management**

**Event Scheduling Management**

**Care Plan Management**

**Documentation Profile Management System - Across All Service Modules**

The single most important aspect of your evv system is the daily maintenance of your scheduled authorized events or visits by your caregivers. **EVMM** monitors, maintains and manages all exceptions within your events, daily.

This area of your evv system holds every billable event authorized by a given care plan. **EVMM** monitors, maintains and manages the billing review cycle within your system and identifies issues with events that are still pending to be resolved, daily.

The final step in your billing cycle is invoice creation and submission. Without this, your agency simply will not get paid. **EVMM** manages the invoice creation and verified submission of your agency's authorized, approved and verified events of services performed by your caregivers.

Event scheduling will have a major impact on your end-of-cycle billing. **EVMM** creates, updates and manages event scheduling within your evv system across authorizations to maximize and capture recognized projected revenue for our Clients.

Your authorizations can and will change or expire without notice. This will have an effect on your agency's scheduling and billing activities moving forward. **EVMM** monitors care plan authorizations within the system for updates in services provided by your agency for past, present and future events.

- Captures & Codes All Event Exceptions
- Creates Exception Verification Request (EVRs)
- Sends EVRs To Client For Response Processing
- Applies Client EVR Response To Events
- Confirms Event Elements
- Confirms Authorizations
- Confirms Billing Elements
- Confirms Events Ready To Be Reviewed As Billable Items
- Capture Confirmation Notes
- Creates Documentation

- Captures & Codes All Pending Billable Events
- Park No-Auth Events
- Communicates Parked No-Auth Events With Client
- Reviews Exhausted Service Units Against Scheduling
- Reviews Authorizations
- Reviews Billing Elements
- Confirms Billable Events As "Items" Ready For Invoicing
- Reduces EOB Error Codes Within Remittance Advice
- Creates Documentation

- Captures All Items To Be Invoiced
- Billable Items Are Further Reviewed For Errors That Effect Final Payment & To Reduce EOB Error Codes Within Remittance Advice
- Converts Billable Items Into Verified Invoices
- Batched Verified Invoices
- Submits Verified Invoices For Payment
- Creates Documentation

- Manages Service Code Authorizations
- Creates Service Schedules Across Authorizations
- Manages Split Shift Service Authorizations If Required
- Identifies Revenue Losses Due To Scheduling Issues
- Maximizes Event Creation
- Maximizes Services Scheduled By Staff
- Maximizes Services Performed By Staff
- Creates Documentation

- Manages Care Plan Authorizations
- Identifies Revenue Losses Due To Authorizations (+/-)
- Identifies Care Plan Losses Due To Expiration Dates
- Manages Event Creation
- Manages Services Offered By Staff
- Manages Services Performed By Staff
- Creates Documentation

**Service Modules Included In Standard Service Package**

**Service Modules Included In Enhanced Service Package**