

Interactive Voice Response (IVR)

Introduction:

An Electronic Visit Verification (EVV) system is the primary method of data collection. If a provider has no availability to a smart phone or tablet to capture GPS, then Interactive Voice Response (IVR) can be used as last resort. IVR is a conditional method of collecting EVV data and requires State approval prior to using it. The document outlines the steps to gain approval and complete visits using IVR.

Using IVR In The Netsmart EVV Solution

The process below outlines the steps to gain approval to complete visits using IVR for agencies using the Netsmart Mobile Caregiver+ solution for visit capture:

Step	Process	Owner
1	Provider requests approval to use IVR from the State	Provider
2	State processes provider's request	State
3	State notifies Netsmart of approval	State
4	Netsmart enables IVR for Recipient	Netsmart
5	Provider set up IVR Pin	Provider
6	Provider schedules visit on Netsmart EVV Admin Portal	Provider
7	Provider completes visit using IVR	Provider

Step 1

Provider makes IVR approval request to the State by email at DHHS.IVR@nebraska.gov.

Step 2

2.1 State responds to request with instructions and spreadsheet (form?) to fill out. Spreadsheet includes:

- The recipient name, email, landline phone (to be used for IVR), address, zip Note: Only phone numbers associated with a verified landline will be approved for IVR use
- The Agency Provider or Independent Provider must provide their name, email, phone, Medicaid ID, and NPI (once NPI is required)
- The reason why mobile application cannot be used.
- The estimated timeline to change to mobile application.

2.2 Policy requirements:

- The State will validate landline phone numbers by using the online validation tool (phonevalidator.com) to confirm the landline phone number
- A landline is required. A number associated with a cellular device cannot be used for IVR.
- The recipient must allow their caregiver(s) to use their landline
- The landline must be available to start and end the visit in the verified location
- No signatures will be gathered using IVR
- The provider will inform the State when IVR is no longer needed. The provider will email MLTC at DHHS.IVR@nebraska.gov. IVR access will then be removed once Mobile access is acquired.
- The State processes and logs request for easy access via JIRA

2.3 State Approval Process:

- Once the above information in steps 2.1 and 2.2 are verified the request and documentation will be sent to the EVV PCS program leads as follows to approve:
 - PAS: Kathy Scheele and Marcy Bartek
 - DDAD, CDD, FSW, AD, TBI, DD: Shauna Adams and Leila Razey

Step 3

Netsmart Workflow for adding IVR:

The following workflow will be adhered to for any member needing IVR enabled or disabled:

1. Member's IVR configuration needs to be enabled/disabled
2. The State creates a NetsmartCONNECT ticket containing the following information:
 - a. Provider Agency
 - b. Member first & last name
 - c. Medicaid ID/NFOCUS ID/NPI
 - d. Address approved for IVR
 - e. Phone number approved for IVR
 - f. Enable/Disable
 - g. Email address for provider and/or caregiver for Netsmart to know who to notify that IVR has been configured.
3. Netsmart enables/disables IVR & updates the NetsmartCONNECT ticket; Notification will be sent to the State via NetsmartCONNECT ticket.
4. The State notifies the provider and recipient of IVR approval.
5. Netsmart will then communicate the below steps to the appropriate personnel:

To set the IVR PIN on the Mobile Caregiver+ mobile application, complete the following steps:

1. Login
2. Tap tri-bar (hamburger) control upper left.
3. Tap "Profile"
4. Enter 7-digit IVR numeric PIN.
5. Tap <Save>

To set the Caregiver IVR PIN on Provider Portal complete the following steps:

1. Navigate to the users screen and search the caregiver / user.
2. Select snowman control to edit the user's profile.
3. Enter a 7-digit numeric IVR PIN.
4. Click <Save>

Schedule the visit in the Provider Portal as normal.

On check-in/out, call the following IVR number 888.350.8038 and follow the voice prompts.

- **Netsmart IVR number: 888.350.8038**
- Follow all the prompts to check in and complete visit
- The completed visit will then be displayed as completed

5. Netsmart will process IVR configuration within 3 business days of the submission of the NetsmartCONNECT request.

Steps to Set up IVR in the Netsmart EVV Solution

Step 1

From the Users screen, select the Caregiver, click on the three dots, located to the right of the record, then click Details. From the User Details screen, click on the Edit icon, the pencil. Click in the IVR PIN field and enter the Caregiver's 7-digit PIN. Click "Update" button

The screenshot shows the 'Edit User' form. It has a title bar 'Edit User'. Below it are two date fields: 'Employee Effective Start Date' and 'Employee Effective End Date'. Then there are two address fields: 'Enter Address Line 1 *' with the value '800 Fairway Dr., Ste 360' and 'Enter Address Line 2'. Below these are 'Enter City *' with 'Deerfield Beach' and 'Enter State *' with a dropdown showing 'FL'. Then 'Enter Zip Code *' with '33441' and 'Username *' with 'dcarr'. At the bottom is 'Enter IVR Pin' with '1234567'. There are 'Update' and 'Cancel' buttons at the bottom left.

Step 2

All IVR visits must first be scheduled using the Netsmart EVV Provider Portal before visits can be completed. See scheduling training for details.

Step 3

1. Caregiver calls into Netsmart IVR system from the approved recipient landline.
2. *On check-in/out, call the following IVR number 888.350.8038 and follow the voice prompts.*
3. IVR system answers call and prompts Caregiver to select language.
4. IVR system prompts Caregiver to enter 7-digit PIN.
5. IVR system prompts Caregiver to start visit.
6. Caregiver starts the service and ends the call.
7. Caregiver calls into Netsmart IVR system from the approved recipient landline to end the service.
8. IVR system prompts Caregiver to enter 7-digit PIN.
9. IVR server loads the current service, in process.
10. IVR system gives Caregiver the option to end the current service.
11. Caregiver chooses the option to end current service.
12. IVR system prompts Caregiver to select which tasks were completed during visit.
13. User enters completed tasks.
14. System records completed task checklist information.
15. If there are additional services system will give the Caregiver the option to start the next service.
16. If there are no other scheduled services, the IVR system thanks the user for using IVR and ends call.
17. *The completed visit will then be displayed as completed.*

Using IVR In An Alternative EVV Vendor Solution

The process below outlines the steps to gain approval to use IVR if the provider is using an Alternative EVV Vendor:

Step	Process	Owner
1	Provider requests approval to use IVR from the state	Provider
2	State processes providers request	State
3	State notifies Netsmart of approval using the above process	State
4	Alternative EVV Vendor enables IVR for Recipient	Alternative EVV Vendor
5	Provider sets up IVR Pin	Provider
6	Provider schedules visit on Alternative EVV Vendor application	Provider
7	Provider completes visit using IVR	Provider
8	Visit is sent to Netsmart from the Vendor	Alternate EVV Vendor
9	Netsmart will run the visit through business rules to ensure the IVR number sent by Alternate Vendors is the approved number configured in the Netsmart system	Netsmart

Netsmart will now be completing configuration to validate the number on the inbound rendered services feed. Netsmart will gather the following data points to configure IVR:

Step 1

Provider makes IVR approval request to the State by email at DHHS.IVR@nebraska.gov.

Step 2

2.1 State responds to request with instructions and spreadsheet (form?) to fill out. Spreadsheet includes:

- The Recipient name, email, landline phone (to be used for IVR), address, zip Note: Only phone numbers associated with a verified landline will be approved for IVR use (do you want to add anything here that only landlines will be approved?)
- The Agency Provider or Independent Provider must provide their, name, email, phone, Medicaid ID, and NPI (once NPI is required)
- The Reason why mobile application cannot be used.
- The Estimated timeline to change to mobile application.

2.2 Policy requirements:

- The State will validate landline phone numbers by using the online validation tool (phonevalidator.com) to confirm the landline phone number
- A landline is required. A number associated with a cellular device cannot be used for IVR. A cell phone cannot be used for IVR.
- The recipient must allow their caregiver(s) to use their landline
- The landline must be available to start and end the visit in the verified location
- Visits will need to be started and ended in the home
- No signatures will be gathered using IVR
- The provider will inform the State when IVR is no longer needed. The provider will email MLTC at DHHS.IVR@nebraska.gov . IVR access will then be removed once Mobile access is acquired.
- The State processes and logs request for easy access via JIRA

2.3 State Approval Process:

- Once the above information in steps 2.1 and 2.2 are verified the request and documentation will be sent to the EVV PCS program leads as follows to approve:
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 - d. Address approved for IVR
 - e. Phone number approved for IVR
 - f. Enable/Disable
 - g. Email address for provider and/or caregiver for Netsmart to know who to notify that IVR has been configured.
3. Netsmart enables/disables IVR & updates the NetsmartCONNECT ticket; Notification will be sent to the State via NetsmartCONNECT ticket.
4. The State notifies the provider and recipient of IVR approval.
 - 4.1. The Alternative EVV Vendor will complete the setup of IVR for their Provider.