



Ohio Department of Medicaid (ODM) Electronic Visit Verification (EVV) Program

Agency Provider Participant Guide

April 2019
v 1.3



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About this Course

This Instructor-led Training (ILT) course introduces Sandata Electronic Visit Verification (EVV) and is designed to facilitate training on the use of the system. The instructor will use this guide to lead each lesson with an overview of the topic in question, followed by a demonstration and hands-on practice of the skills required to execute activities within Sandata EVV.





Course Duration

The estimated time for this course is 1 day.

Performance Objectives

- Navigate Sandata EVV.
- Use the Security module to:
 - Create and modify users
 - Assign and modify roles/privileges to users
 - Delete/Reactivate users
 - Reset user passwords
 - Create roles and assign privileges
 - Change a password
- Describe how to order EVV devices for clients.
- Explain how to request the return of an EVV device for a client.
- Use *Data Entry* to:
 - Manually input and maintain both clients and employees
 - Delete/Reactivate clients and employees
- Explain the purpose and basic functionality of mobile visit verification using Sandata Mobile Connect (SMC) and Telephonic Visit Verification (TVV).
- Use the Dashboard module to view real-time exceptions.
- Use the Visit Maintenance module to manage, correct visit exceptions and add manual visit, as necessary.
- Know the difference between Daily and Date Range reports.
- Run both Daily and Date Range reports.

Conventions Used in this Document

Convention	Description
Bold Text	Used to alert a selection to be made or name of a field.
	Used to indicate an external tool or support (e.g. reference information) for instructors or participants.
	Used to indicate workflow.
	Use to highlight any risk management points.
	Used to highlight a key point of which the user should take notice.
	Used to indicate a tip and/or shortcut.
	Used to indicate instructor demonstration.
	Used to indicate participant should follow along with the instructor.
	Used to indicate participant should perform exercise independently.

Course Agenda

Minutes	Module
15	Course Introduction
5	Program Overview
40	System Overview <ul style="list-style-type: none"> • eTRAC Welcome Kits • Log in to Sandata EVV • Navigation • Common Functionality
30	Security (Office Staff) <ul style="list-style-type: none"> • Manage Users • Creating Users
40	Data Entry <ul style="list-style-type: none"> • Staff Entry and Edit • Client Entry and Edit
30	Device Management <ul style="list-style-type: none"> • Ordering Process • Return Process
65	SMC / TVV <ul style="list-style-type: none"> • SMC Call-In/Call-Out • Telephony Call-In/Call-Out
75	Visit Maintenance <ul style="list-style-type: none"> • Accessing Visit Maintenance • Understanding Filter and Sort Options • Understanding Visit Exceptions • Reviewing and Resolving Visit Exceptions
20	Reports <ul style="list-style-type: none"> • Accessing Reports • Reviewing Report Types • Exporting Report Types
20	Next Steps <ul style="list-style-type: none"> • Confirmation e-mail • Welcome Kits • Begin using EVV

20	Assessment & Evaluation <ul style="list-style-type: none"> • Wrap-up Assessment • Training Evaluation
60	Group Visits – Only those providers who may provide group visits should stay for this session. <ul style="list-style-type: none"> • Starting a visit • Ending a visit • Adding/Subtracting an individual to a group visit • Visit Maintenance • Reporting
90	Lunch and Breaks
515	Total Course Time

Overview/Objectives

This training is an in-depth review of the Sandata EVV environment pointing out features, structure and requirements. In this session, we will cover the following topics:

- Accessing and Logging on and off Sandata EVV
- Using features and functions to navigate Sandata EVV
- User Set-up and Security
- Data Input into Sandata EVV – Clients (Individuals) and Employees (Direct Care Workers)
- Device Order and Return processes
- SMC and TVV
- Digital Dashboard and Visit Maintenance
- Accessing reports

The goal of this training is to present the functionality of Sandata EVV and to focus on the concepts of how Sandata EVV lends support in doing visit activities.

This class will be a combination of classroom instruction, handouts and practice exercises. At the end of the session, you will be asked to complete a Training Assessment exercise to reinforce the skills learned today, as well as an online training evaluation.

For the training exercises, we'll use a database that is designed specifically for training. We will not use real clients; therefore, the data cannot be harmed. The training database is a close copy of the production system, but clients and examples have been added to use during classes.

1 Program Overview

Module Time

15 minutes

This lesson introduces the Ohio Department of Medicaid's Electronic Visit Verification (EVV) program. It provides an overview of the benefits and its core functionality.

Module Objectives

After completing this lesson, you will be able to:

- describe the 21st Century Cures Act; and
- describe the ODM program objectives and the services under the program.

Key Terminology

Term/Acronym	Definition
Aggregator	Central data store for Sandata EVV and alternate data collection EVV systems
Alternate EVV System	Any EVV system that is not Sandata’s
BYOD	Bring Your Own Device
DAS	Department of Administrative Services
DODD	Department of Developmental Disabilities
DCW	Direct Care Worker
EVV	Electronic Visit Verification
Fee-for-Service (FFS)	A payment model under which a provider is paid for every Medicaid eligible service rendered to the recipient
GPS	Global Positioning System
MCO	Managed Care Organization
MITS	Medicaid Information Technology System – Ohio’s claims adjudication system, which is managed and operated by DXC Technology
MVV	Sandata Mobile Visit Verification. The name of Sandata’s mobile application used at the start of Phase 1 of the EVV. Moving forward, will be referred to as Sandata Mobile Connect (SMC).
ODA	Ohio Department of Aging
ODM	Ohio Department of Medicaid
ODM EVV	All parts of Sandata’s EVV solution for Ohio Department of Medicaid – provider portal, EVV technologies and Aggregator
OHC	Ohio Home Care
PDN	Private Duty Nursing
PIMS	PASSPORT Information Management System
Sandata EVV	Sandata’s Electronic Visit Verification system
Sandata Mobile Connect (SMC)	Sandata’s Mobile Visit Verification application, formally known as MVV in Phase 1
Telephonic Visit Verification (TVV)	System used to record visit data and verification when SMC is not available

Introduction

Congress established a January 1ST, 2020 requirement for all states to use an EVV system, in accordance with the 21st Century Cures Act.

The Ohio Department of Medicaid (ODM) began using an EVV system for Phase 1 services for many home and community-based services in January 2018. EVV is an electronic system that verifies when provider visits occur and documents the precise time services begin and end. ODM will provide the Sandata EVV system free-of-charge for all providers.

PHASE 1 SERVICES	Implemented January 8, 2018
	<p>EVV program for services billed directly to Medicaid for fee-for-service:</p> <ul style="list-style-type: none"> ▪ State Plan Home Health Aide ▪ State Plan Home Health Nursing ▪ State Plan RN Assessment ▪ Ohio Home Care Waiver (OHCW) Nursing ▪ OHCW Personal Care Aide ▪ OHCW Home Care Attendant ▪ OHCW RN Assessment ▪ Private Duty Nursing (PDN)

ODM’s Phase 2 of the EVV program launches training in May 2019 and adds Managed Care Organizations (MCOs), Ohio Department of Aging (ODA), Ohio Department of Developmental Disabilities (DODD) and Group Visits.

PHASE 2 SERVICES	All providers must be entering EVV visits beginning August 5, 2019
	<p>EVV Program for the following payers:</p> <p>Managed Care Organizations billing Medicaid (Aetna, United Healthcare, Molina, Buckeye, Paramount, and CareSource). EVV implementation in managed care will apply to the following services:</p> <ul style="list-style-type: none"> ▪ State Plan Home Health Aide ▪ State Plan Home Health Nursing ▪ State Plan RN Assessment ▪ HCBS 1915c Waiver Nursing ▪ HCBS 1915c Waiver Personal Care Aide ▪ HCBS 1915c Waiver Home Care Attendant ▪ Private Duty Nursing (PDN) <p>**Self-directed services are not included in Phase 2</p>

	<p>Ohio Department of Aging (ODA):</p> <ul style="list-style-type: none"> ▪ PASSPORT- Home Care Attendant Nursing ▪ PASSPORT- Home Care Attendant Personal Care ▪ PASSPORT- Personal Care ▪ PASSPORT- Waiver Nursing LPN ▪ PASSPORT- Waiver Nursing RN <p>**Self-directed services are not included in Phase 2</p>	<p>Ohio Department of Developmental Disabilities (DODD):</p> <ul style="list-style-type: none"> • Individual Options (IO) Waiver Nursing • IO/Level 1 Homemaker/Personal Care (HPC) <p>Exceptions:</p> <ul style="list-style-type: none"> • Will not apply to participant-directed services • Will not apply to the on-site/on-call component of HPC will not apply to services billed using the daily billing unit (DBU)
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ODM Program Objectives

- Promote quality outcomes for clients (Quality of Care)
 - Ensure the health and welfare of clients choosing to receive long-term services and support where they live, or otherwise receive care in the community
- Reduce billing errors and contain costs (Program Integrity)
 - Improved payment accuracy by using technology to match data on claims with data in service documentation (e.g., time and duration of visit)

Covered Services

This table lists the covered services for the program, including services for the initial launch.

Payer	Program Name	Service Description Text	Service Description	DODD or MITS Procedure Code	Maps to MITS Procedure Code	Group Visits / Multiple Employees
DODD	Individual Option	Homemaker /Personal Care – 2 Staff	IO HPC-2 Staff	AMW	MR816	Y/Y
DODD	Individual Option	Homemaker /Personal Care – 3 Staff	IO HPC-3 Staff	AMX	MR817	Y/Y
DODD	Individual Option	Homemaker /Personal Care – 4 Staff	IO HPC-4 Staff	AMY	MR818	Y/Y

Payer	Program Name	Service Description Text	Service Description	DODD or MITS Procedure Code	Maps to MITS Procedure Code	Group Visits / Multiple Employees
DODD	Individual Option	Homemaker /Personal Care – 5 Staff	IO HPC-5 Staff	AMZ	MR819	Y/Y
DODD	Individual Option	Homemaker /Personal Care – 1 Staff	IO HPC-1 Staff	APC or APV	MR940	Y/N
DODD	Individual Option	Homemaker /Personal Care Competency Based – 1 Staff	IO HPC comp based-1 Staff	AQC or AQV	DD250	Y/N
DODD	Individual Option	Homemaker /Personal Care Competency Based – 2 Staff	IO HPC comp based-2 Staff	AQW	DD251	Y/Y
DODD	Individual Option	Homemaker /Personal Care Competency Based – 3 Staff	IO HPC comp based-3 Staff	AQX	DD252	Y/Y
DODD	Individual Option	Homemaker /Personal Care Competency Based – 4 Staff	IO HPC comp based-4 Staff	AQY	DD253	Y/Y
DODD	Individual Option	Homemaker /Personal Care Competency Based – 5 Staff	IO HPC comp based-5 Staff	AQZ	DD254	Y/Y

Payer	Program Name	Service Description Text	Service Description	DODD or MITS Procedure Code	Maps to MITS Procedure Code	Group Visits / Multiple Employees
DODD	Individual Option	Waiver Nursing LPN	DD Nursing Indep RN	T1002	IO T1002	N/N
DODD	Individual Option	Waiver Nursing RN	DD Nursing Indep RN	T1003	IO T1003	N/N
DODD	Level 1	Homemaker /Personal Care-2 Staff – Emer Benefit	LV1 HPC-2 Staff Emer Ben	EMW	MR824	Y/Y
DODD	Level 1	Homemaker /Personal Care-3 Staff – Emer Benefit	LV1 HPC-3 Staff Emer Ben	EMX	MR825	Y/Y
DODD	Level 1	Homemaker /Personal Care-4 Staff – Emer Benefit	LV1 HPC-4 Staff Emer Ben	EMY	MR826	Y/Y
DODD	Level 1	Homemaker /Personal Care-5 Staff – Emer Benefit	LV1 HPC-5 Staff Emer Ben	EMZ	MR827	Y/Y
DODD	Level 1	Homemaker /Personal Care-1 Staff – Emer Benefit	LV1 HPC-1 Staff Emer Ben	EPC or EPV	MR980	Y/N
DODD	Level 1	Homemaker /Personal Care Competency Based – 1 Staff – Emer Benefit	LV1 HPC comp based-1 Staff Emer Ben	EQC or EQV	DD260	Y/N

Payer	Program Name	Service Description Text	Service Description	DODD or MITS Procedure Code	Maps to MITS Procedure Code	Group Visits / Multiple Employees
DODD	Level 1	Homemaker /Personal Care Competency Based – 2 Staff – Emer Benefit	LV1 HPC comp based-2 Staff Emer Ben	EQW	DD261	Y/Y
DODD	Level 1	Homemaker /Personal Care Competency Based – 3 Staff – Emer Benefit	LV1 HPC comp based-3 Staff Emer Ben	EQX	DD262	Y/Y
DODD	Level 1	Homemaker /Personal Care Competency Based – 4 Staff – Emer Benefit	LV1 HPC comp based-4 Staff Emer Ben	EQY	DD263	Y/Y
DODD	Level 1	Homemaker /Personal Care Competency Based – 5 Staff – Emer Benefit	LV1 HPC comp based-5 Staff Emer Ben	EQZ	DD264	Y/Y
DODD	Level 1	Homemaker /Personal Care-2 Staff	LV1 HPC-2 Staff	FMW	MR820	Y/Y
DODD	Level 1	Homemaker /Personal Care-3 Staff	LV1 HPC-3 Staff	FMX	MR821	Y/Y
DODD	Level 1	Homemaker /Personal Care-4 Staff	LV1 HPC-4 Staff	FMY	MR822	Y/Y

Payer	Program Name	Service Description Text	Service Description	DODD or MITS Procedure Code	Maps to MITS Procedure Code	Group Visits / Multiple Employees
DODD	Level 1	Homemaker /Personal Care-5 Staff	LV1 HPC-5 Staff	FMZ	MR823	Y/Y
DODD	Level 1	Homemaker /Personal Care-1 Staff	LV1 HPC-1 Staff	FPC or FPV	MR970	Y/N
DODD	Level 1	Homemaker /Personal Care Competency Based – 1 Staff	LV1 HPC comp based-1 Staff	FQC or FQV	DD255	Y/N
DODD	Level 1	Homemaker /Personal Care Competency Based – 2 Staff	LV1 HPC comp based-2 Staff	FQW	DD256	Y/Y
DODD	Level 1	Homemaker /Personal Care Competency Based – 3 Staff	LV1 HPC comp based-3 Staff	FQX	DD257	Y/Y
DODD	Level 1	Homemaker /Personal Care Competency Based – 4 Staff	LV1 HPC comp based-4 Staff	FQY	DD258	Y/Y
DODD	Level 1	Homemaker /Personal Care Competency Based – 5 Staff	LV1 HPC comp based-5 Staff	FQZ	DD259	Y/Y

Payer	Program Name	Service Description Text	Service Description	DODD or MITS Procedure Code	Maps to MITS Procedure Code	Group Visits / Multiple Employees
MCOs	MyCare Waiver	MyCare Waiver Nursing - RN	RN services	T1002	MyC T1002	Y/N
MCOs	MyCare Waiver	MyCare Waiver Nursing - LPN	Passport LPN/LVN services	T1003	MyC T1003	Y/N
MCOs	MyCare Waiver	MyCare Waiver Homecare Attendant	Attendant Care Services	S5125	MyC S5125	Y/N
MCOs	MyCare Waiver	MyCare Waiver Personal Care Aide	Personal Care Services	T1019	MyC T1019	Y/N
ODM	Ohio Home Care Waiver	OHC Waiver Nursing RN	RN services	T1002	OHC T1002	Y/N
ODM	Ohio Home Care Waiver	OHC Waiver Homecare Attendant	Attendant Care Services	S5125	OHC S5125	Y/N
ODM	Ohio Home Care Waiver	OHC Waiver Nursing LPN	LPN/LVN services	T1003	OHC T1003	Y/N
ODM	Ohio Home Care Waiver	OHC Waiver Personal Care Aide	Personal Care Services	T1019	OHC T1019	Y/N
ODA	PASSPORT	PASSPORT – Home Care Attendant Nursing	Passport Attendant Care Services	S5125 + HQ, OTHQ, OT	PT680	N/N

Payer	Program Name	Service Description Text	Service Description	DODD or MITS Procedure Code	Maps to MITS Procedure Code	Group Visits / Multiple Employees
ODA	PASSPORT	PASSPORT - Home Care Attendant Personal Care		S5125 + U8, U8HQ, UOHQ, U8OT	PT681	N/N
ODA	PASSPORT	PASSPORT – Waiver Nursing RN	Passport RN services	T1002 + RN, RNHQ, OTHQ, OT	PT530	N/N
ODA	PASSPORT	PASSPORT – Waiver Nursing LPN	Passport LPN/LVN services	T1003 + LPN, LPHQ, OTHQ, OT	PT531	N/N
ODA	PASSPORT	PASSPORT – Personal Care	Passport Personal Care Services	T1019 + UA, UAU2	PT624	N/N
ODM and MCOs	State Plan	State Plan Home Health Aide	Home Health Aide	G0156	G0156	Y/N
ODM and MCOs	State Plan	State Plan Nursing RN	Skilled nursing in a home health setting	G0299	G0299	Y/N
ODM and MCOs	State Plan	State Plan Nursing LPN	Skilled nursing in a home health setting	G0300	G0300	Y/N
ODM and MCOs	State Plan	State Plan PDN	Private Duty / independent nursing service(s)	T1000	T1000	Y/N
ODM and MCOs	State Plan	State Plan RN Assessment	RN Assessment	T1001	T1001	N/N



The following is not included in this implementation:

Service Plans/Authorizations/Prior Authorizations (PAs), Member Feed from the Payer, Scheduling, Billing, Payroll, interfaces back to the agencies, Alerts

2 System Overview

Module Time

40 minutes

This lesson demonstrates how to log in to Sandata EVV.

Module Objectives

After completing this lesson, you will be able to:

- access and log in to Sandata EVV;
- reset passwords;
- navigate Sandata EVV (with/without Americans with Disabilities Act (ADA) support); and
- define common functions within Sandata EVV.

Key Terminology

Term	Definition
Americans with Disabilities Act (ADA)	The Americans with Disabilities Act of 1990 is a civil rights law that prohibits discrimination based on disability.
Job Access With Speech (JAWS)	Job Access With Speech is a computer screen reader program for Microsoft Windows that allows blind and visually impaired users to read the screen either with a text-to-speech output or by a refreshable Braille display

Introduction

This document details the functionality of Sandata EVV. It is a web-based system accessed via Internet Explorer, Mozilla Firefox or Google Chrome web browsers. It allows for client/employee data entry, paperless review/approval of visits and reporting.

Browser Requirements

Sandata supports the current and prior major releases of Microsoft Internet Explorer, Mozilla Firefox and Google Chrome on a rolling basis. We then discontinue support for the third-most recent major release. This policy to support modern browsers allows us to take advantage of the most recent efficiencies in the browsers to maximize the user experience and also ensure our solutions are running on the most recent security and performance updates.

Overview

Sandata EVV consists of seven (7) sections. This document is divided into the following major sections:

- *Navigate Modules*
- *Security*
- *Data Entry*
- *Dashboard*
- *Visit Maintenance*
- *Reports & Exports*
- *Group Visits*

Log-in Screen

How to Log In

System security requires that you log on using the URL (<https://evv.sandata.com>) provided in the Welcome Kit. The Welcome Kit is provided upon completion of training through the eTRAC Portal.

Follow the steps below to log in to Sandata EVV for the first time:

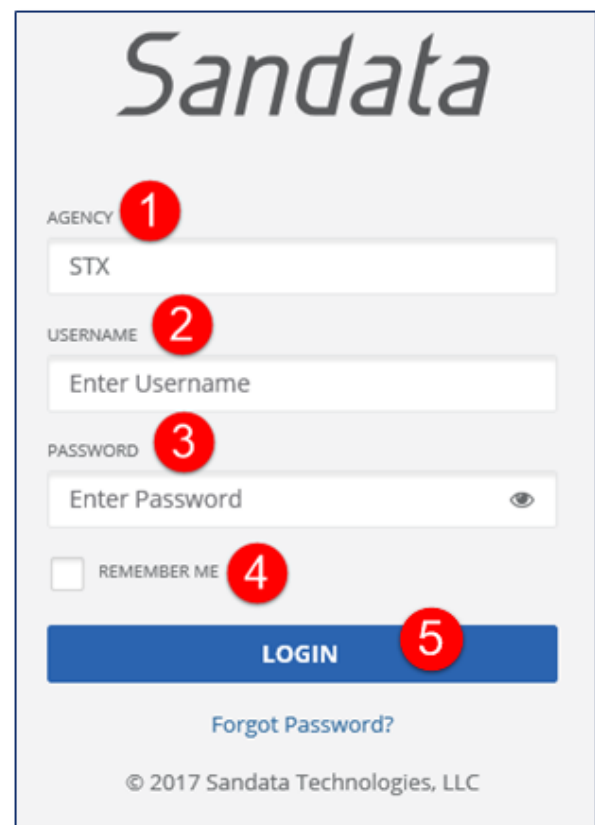
- Agency EVV Security Administrator – use the credentials received in the Welcome Kit and click **LOGIN**
- All other Users – enter the credentials provided by the Agency EVV Security Administrator and click **LOGIN**

1. **AGENCY** – Example: STX#### (#### = account number)
2. **USERNAME** – The username is the email address used when creating a system user (username is not case sensitive).
3. **PASSWORD** – Must be at least 12 characters long, have at least one upper case, one lower case letter, one numeric character and one “special” character (@#\$%^). The password is case sensitive.



Clicking the “eye” icon will display/hide the password information entered.

4. **REMEMBER ME** – When enabled, this checkbox will preserve the last Agency and Username entered.
5. **LOGIN** – gain access to Sandata EVV.



The image shows a screenshot of the Sandata login interface. At the top is the Sandata logo. Below it are four input fields: 'AGENCY' (containing 'STX'), 'USERNAME' (containing 'Enter Username'), 'PASSWORD' (containing 'Enter Password'), and a 'REMEMBER ME' checkbox. A blue 'LOGIN' button is at the bottom, with a 'Forgot Password?' link below it. A copyright notice '© 2017 Sandata Technologies, LLC' is at the very bottom. Red circles with numbers 1 through 5 are overlaid on the form to indicate the steps: 1 on the Agency field, 2 on the Username field, 3 on the Password field, 4 on the Remember Me checkbox, and 5 on the Login button.



REMEMBER ME – When checked, preserves the last username entered.

EVV Lock Out

A user is locked out of the system after five (5) unsuccessful login attempts. The EVV security administrator must unlock the user account.



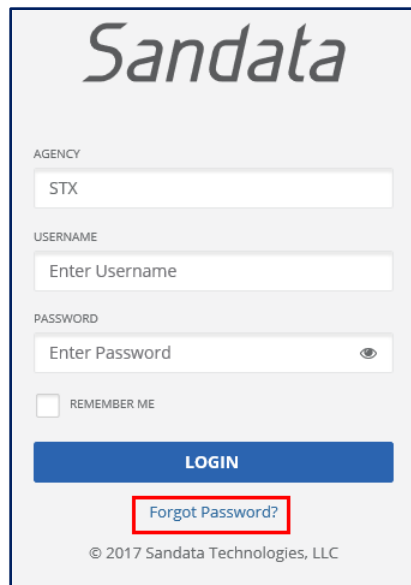
If the Security Administrator is locked out and there are no other users with the Security Administrator to unlock the user account, then the user must call the EVV Provider Hotline at (855) 805-3505 to unlock their account.

How to Reset a Forgotten Password

Passwords are valid for 60 days. A user will begin receiving prompts 10 days before their password expiration date to reset the password.

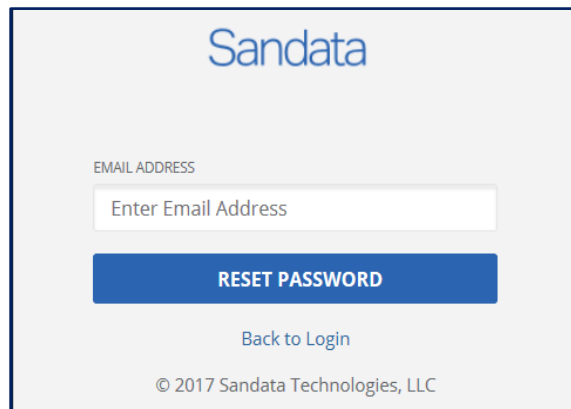
There can be times when a password is forgotten and it is necessary to reset the password (e.g., a new user forgets what they set as their password during the initial login process).

1. Click **Forgot Password?** A window opens to enter the email address to receive a temporary password.



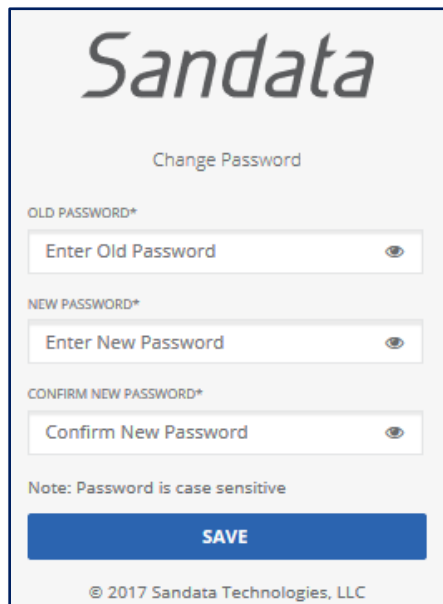
The image shows a login form for Sandata. At the top is the Sandata logo. Below it are three input fields: 'AGENCY' with 'STX' entered, 'USERNAME' with 'Enter Username' as a placeholder, and 'PASSWORD' with 'Enter Password' as a placeholder and an eye icon for visibility. Below these fields is a 'REMEMBER ME' checkbox. A blue 'LOGIN' button is positioned below the checkbox. A red box highlights the 'Forgot Password?' link below the login button. At the bottom of the form is the copyright notice '© 2017 Sandata Technologies, LLC'.

2. Enter the **EMAIL ADDRESS** (username) used to log in.



The screenshot shows the Sandata Reset Password interface. At the top is the Sandata logo. Below it is the label "EMAIL ADDRESS" above a text input field containing the placeholder "Enter Email Address". Underneath the input field is a blue button labeled "RESET PASSWORD". Below the button is a link labeled "Back to Login". At the bottom of the screen is the copyright notice "© 2017 Sandata Technologies, LLC".

3. Click **RESET PASSWORD**. The system sends an email with a temporary password.
4. Click **Back to Login**. The *Login* screen displays.

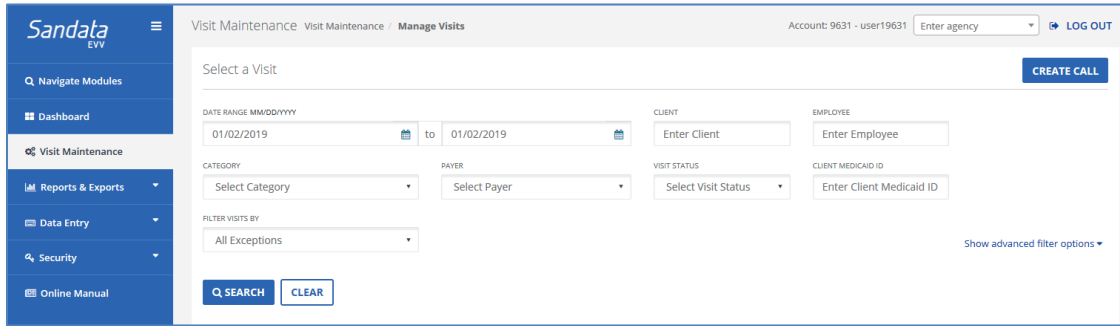


The screenshot shows the Sandata Change Password interface. At the top is the Sandata logo. Below it is the heading "Change Password". There are three password input fields: "OLD PASSWORD*" with the placeholder "Enter Old Password", "NEW PASSWORD*" with the placeholder "Enter New Password", and "CONFIRM NEW PASSWORD*" with the placeholder "Confirm New Password". Each field has a small eye icon to the right. Below the fields is a note: "Note: Password is case sensitive". At the bottom is a blue button labeled "SAVE". At the very bottom is the copyright notice "© 2017 Sandata Technologies, LLC".

5. Enter the temporary password in the **OLD PASSWORD*** field.
6. Create and enter a new password in the **NEW PASSWORD*** field.
7. Re-enter the password in the **CONFIRM NEW PASSWORD*** field.
8. Click **SAVE**.

Navigating Sandata EVV

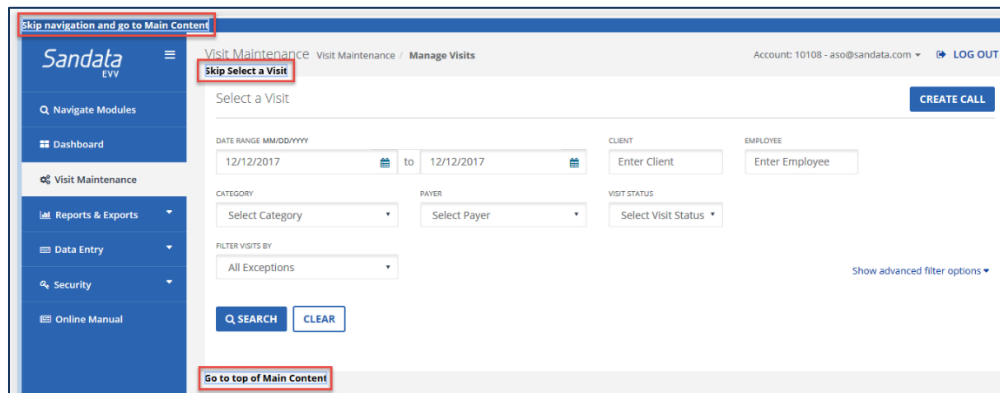
After successful login, the *Visit Maintenance* screen displays.



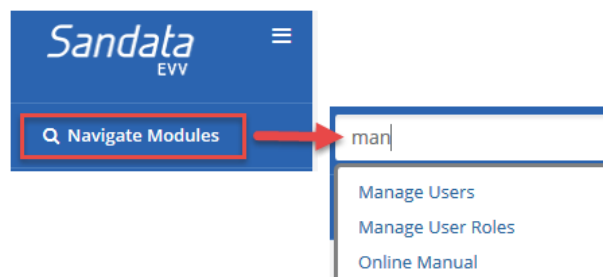
ADA Navigation Support

Sandata EVV can be navigated using only the keyboard. It is also Job Access With Speech (JAWS) Reader compliant. Below is the *Visit Maintenance* screen. The *Visit Maintenance* screen displays immediately after log in.

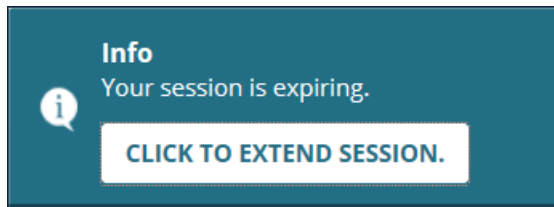
1. Using the <Tab> key to move through the system, the links below display individually. They allow you to skip the navigation options and begin with the main content.



2. **Navigate Modules** on the *Navigation* panel to open the **Navigate Modules** field. This allows users to jump between screens by typing the name of the screen in the field. A link to the screen displays below the field.

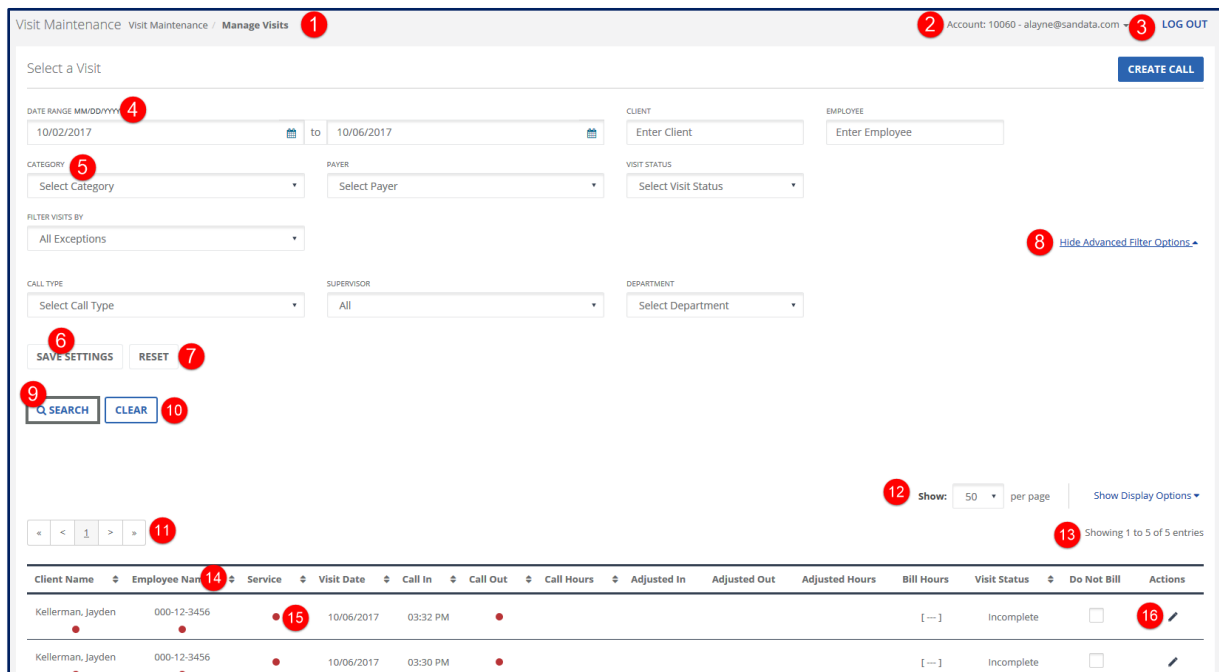


- To accommodate users that require more time, when a user remains idle for 15 (fifteen) minutes, the system displays a warning message asking if they require more time. If the user does not respond to the prompt within 2 (two) minutes, Sandata EVV automatically times out.



Common Functions of Sandata EVV

This section describes common functions within Sandata EVV. Here is an example with the different items that are typically displayed.












The screenshot shows the 'Manage Visits' interface with various filters and a data table. Numbered callouts highlight specific UI elements:










- 1: Breadcrumbs (Visit Maintenance / Manage Visits)
- 2: Account information (Account: 10060 - alayne@sandata.com)
- 3: LOG OUT button
- 4: DATE RANGE (10/02/2017 to 10/06/2017)
- 5: CATEGORY dropdown
- 6: SAVE SETTINGS button
- 7: RESET button
- 8: Hide Advanced Filter Options link
- 9: SEARCH button
- 10: CLEAR button
- 11: Page navigation (1)
- 12: Show: 50 per page
- 13: Showing 1 to 5 of 5 entries
- 14: Employee Name column header
- 15: Service column header
- 16: Actions column header

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
Kellerman, Jayden	000-12-3456		10/06/2017	03:32 PM						[--]	Incomplete	<input type="checkbox"/>	
Kellerman, Jayden	000-12-3456		10/06/2017	03:30 PM						[--]	Incomplete	<input type="checkbox"/>	

Common Functions in Sandata EVV





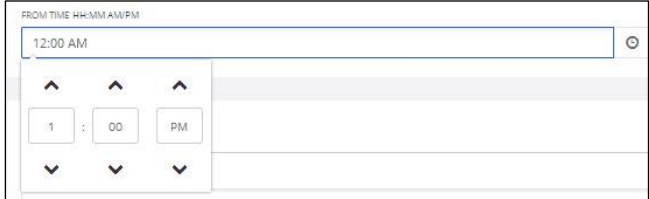









Here is a list of items commonly found in Sandata EVV.






	Item	Name	Description
1.		Navigation Path	System and which screen is displayed.
2.		Account and User Display	Displays the account the user is logged into and the username/email address of the user currently logged in. For more about these fields, see the section Sandata Header.
3.		Log Out Button	Logs the user out of the system and displays the log-in screen.
4.		Calendar Icon	Clicking this icon displays a calendar from which the user selects a date. 
5.		Show List Icon	Located in list fields, clicking this icon displays the list. 
6.		Save Settings Button	When advanced filter settings are displayed, this button will save selected search fields so that they will be displayed again at the next user login.
7.		Reset Button	If search settings have been saved, this button will clear them.

	Item	Name	Description
8.		Show/Hide Advanced Filter Options	On screens enabled for searches, clicking this link shows or hides any advanced filters that are available.
9.		Search Button	Executes a search.
10.		Clear Button	Clears a search field or series of search fields.
11.		Page Listing	This provides a button to go to the start and end of a list, along with the ability to display any individual page of the list.
12.		Number of Items per Page Setting	This setting allows users to select how many rows of a list are displayed on each page.
13.		Page Contents	This results display is shown on pages on which there are either lists or search results. Located at the top and bottom of each page, this results display shows the list entries displayed on each page, as well as the total number of rows in the list.
14.		List Sorting Icon	Located in lists and reports, users can sort the contents of a list by any column that has this icon in its header. Click to sort in ascending or descending order.
15.		Exception Indicator	When viewing search results for visits, any field marked by a red dot indicates data that is missing.
16.		Edit Button	Opens an individual record with its fields in an editable state.

Additional Buttons and Icons

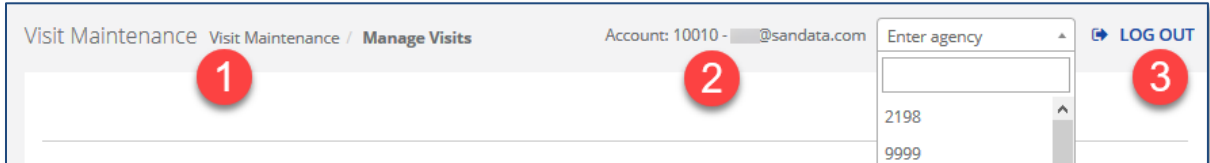
The following buttons are frequently displayed throughout the Sandata system:


Button	Function	Description
	Add Button	Clicking this button adds another row to a listing.
	Cancel Button	Cancels an operation and closes the screen.
	Check Box	Filling a check box enables a feature, clearing it disables it.
	Clock Icon	In fields that require a time to be entered, clicking this icon allows the user to select a time. 
	Create Button	Creates a new item in any list.
	Delete/Terminate Button	Moves an item/user to “Inactive” status. The User is prompted to confirm.
	Finish Button	Completes and terminates a task.
	Lock Icon	Displays the password to help with log-in and password entry.
	Play Icon	Starts a playback of the client Voice Verification recording.
	Radio Button	Radio buttons allow the user to select one or more items from a list.
	Reactivate Button	Moves and item/user to “Active’ status. User is prompted to confirm.
	Record Button	Pressing this button begins the client voice recording during the SMC call-out process.
	Refresh Button	Refreshes one or several fields on a screen, usually search fields.

Button	Function	Description
	Save Button	Located in <i>Data Entry</i> fields, this button saves the information that has been entered.
	Show Information Icon	<p>Clicking this icon displays additional information about a system field. For example, at the login screen clicking this icon displays a password being typed in.</p> 
	Stop recording Button	Pressing this button stops the client voice recording during the SMC call-out process.
	Terminate Button	This button moves either a client record or an employee record to “Terminated” status.

Sandata Header

This header is located at the top of every screen in the Sandata EVV. It displays key information about each screen along with functionality to navigate between modules or to log out of the system.



	Function	Description
1.	Navigation Path	This field shows a user the exact location in the system and the current screen.
2.	Account and User Display	<p>Displays the account the user is logged into and the username/email of the user currently logged in.</p> <p><u>Moving Between Multiple Accounts</u></p> <p>Click the small arrow icon alongside the user name to display a list of accounts for which the user is authorized to access. Selecting the account number moves the user to that account without having to log out and log in again.</p> <hr/> <p> A user must have permissions to log into more than one account and the username must be the same across all accounts</p> <hr/> <p>The account the user is currently logged into is indicated by a check box.</p>
3.	Log Out	Logs the user out of the system and displays the login screen.





Confirmation and Error Messages

Confirmation and error messages are displayed at the top, center of the screen.



Assignment Buttons

These buttons are displayed whenever a screen has settings that require moving items between **Available** and **Assigned** fields, for example in the Security settings. The buttons allow single or multiple items to be added or removed.

Button	Function	Description
	Add All	This button moves all items from the Available field to the Assigned field.
	Add Item(s)	This button moves single or multiple items from the Available field to the Assigned field. Click on multiple items to add them together, if necessary.
	Remove Item(s)	This button moves single or multiple items from the Assigned field to the Available field. Click on multiple items to add them together, if necessary.
	Remove All	This button moves all Items from the Assigned field to the Available field.

3 Security (User Set-up)

Module Time

30 minutes

This lesson teaches how to set-up, create and maintain system users.

Module Objectives

After completing this lesson, you will be able to:

- define key terminology;
- access the security module;
- create and manage users;
- create and manage user roles; and
- change your password.

Key Terminology

Term	Definition
Administrator	The person at the agency with the ability to create new users, assign roles, system privileges and reset passwords.
Individual/Client	A person who receives services through the Medicaid program.
Privilege	A single permission.
Role	A group of privileges (permissions) assigned to the user which allows the user to perform visit activities in Sandata EVV.
Security	The module in Sandata EVV where users (office staff) are set up to use the system.
User	A person with a unique login and password to Sandata EVV.
Username	The user’s email address.

Introduction

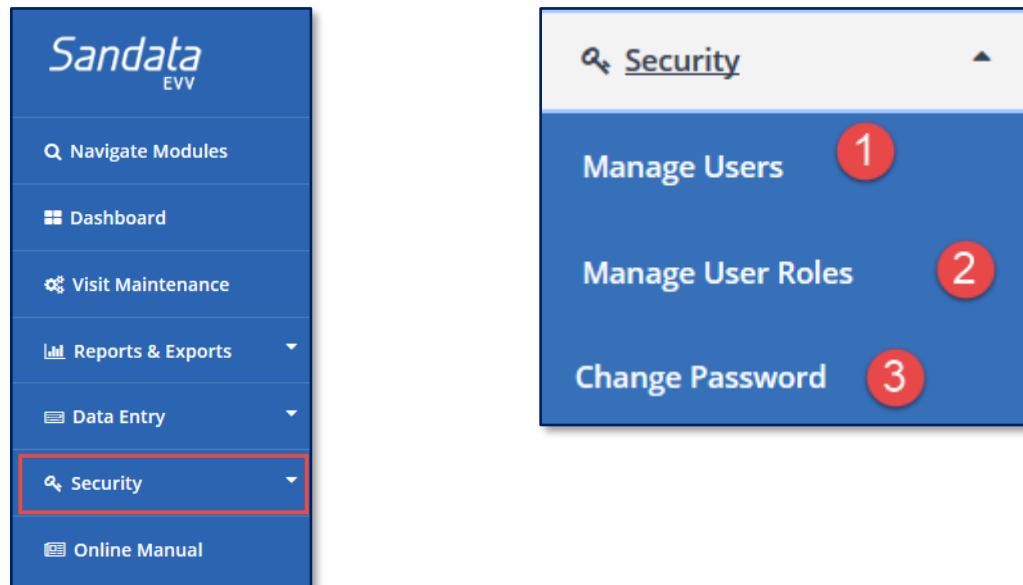
Sandata EVV Security Settings

The Security settings in Sandata EVV allow Administrators to to:

- assign user roles to specific users;
- create user roles and assign system privileges to those roles;
- assign system privileges;
- grant and revoke system privileges;
- reset user passwords; and
- reset own password.

Accessing Sandata EVV Security

From the Sandata EVV Main Menu click **Security**. The *Security* panel expands and displays three sections of security settings.

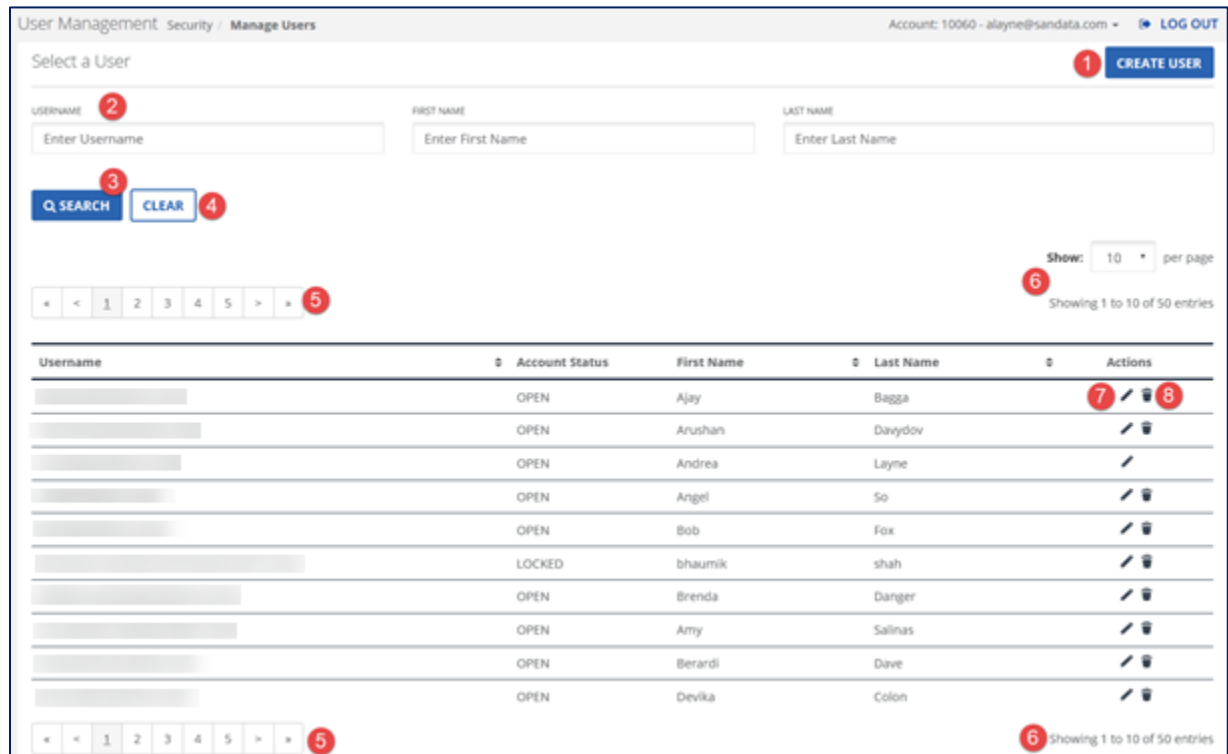


The security settings of Santrax EVV are divided into three sections:

1. **Manage Users** – This section allows the user to create and maintain users.
2. **Manage User Roles** – Roles allow the system administrator to group privileges and assign them to users of the EVV system.
3. **Change Password** – This section allows the logged in user to change his/her password.

Manage Users Screen Overview

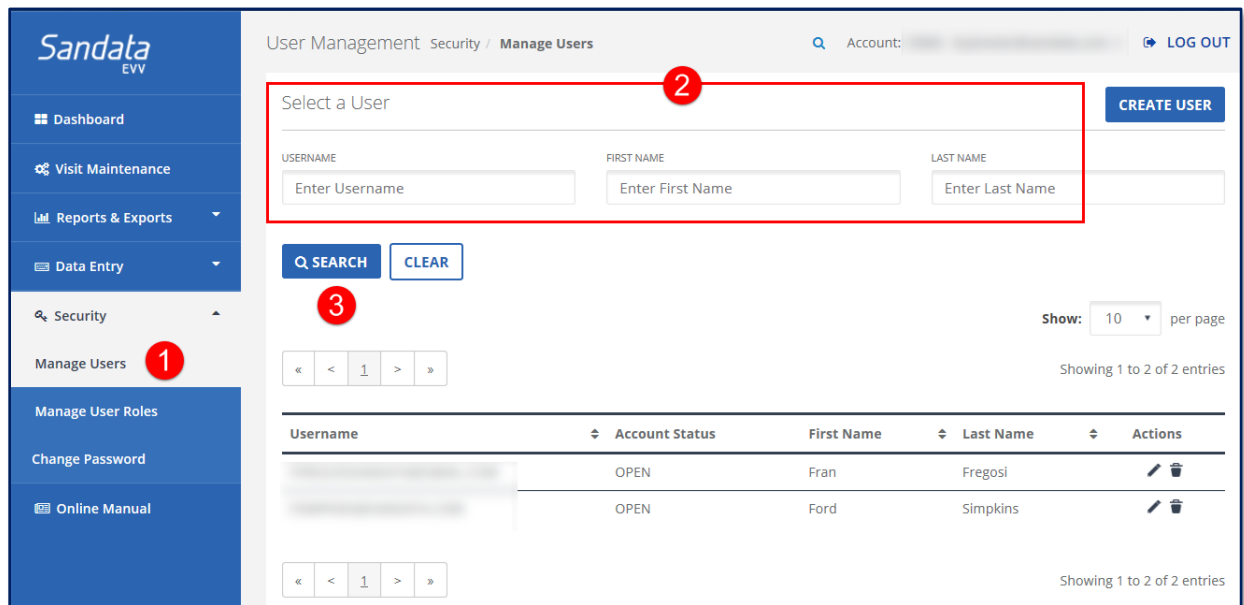
This function allows the creation and management of users' access to Sandata EVV. Users are staff members that are authorized to use Sandata EVV. Their records can be searched, created and deactivated. Attributes—user information, roles and privileges—can be edited. User accounts can also be locked and/or unlocked and, if necessary, a password can be reset.



1. **CREATE USER** – Used to create a new user profile.
2. **Filters** – Allows for a search by either **USERNAME**, **FIRST NAME** or **LAST NAME** or a combination of the three.
3. **SEARCH** – Retrieves the related information based upon the filters used.
4. **CLEAR** – Deletes the information from the filter fields to allow for additional searches with new criteria.
5. **Page Navigation** – Allows for navigating through the list using page numbers or arrows. The number of pages displayed is dependent upon the number of results.
6. **Show** – Allows for input of how many entries are shown per page and displays the total number of results returned.
7. **Edit** – Edit a user.
8. **Delete** – Inactivate a user.

Searching for Users

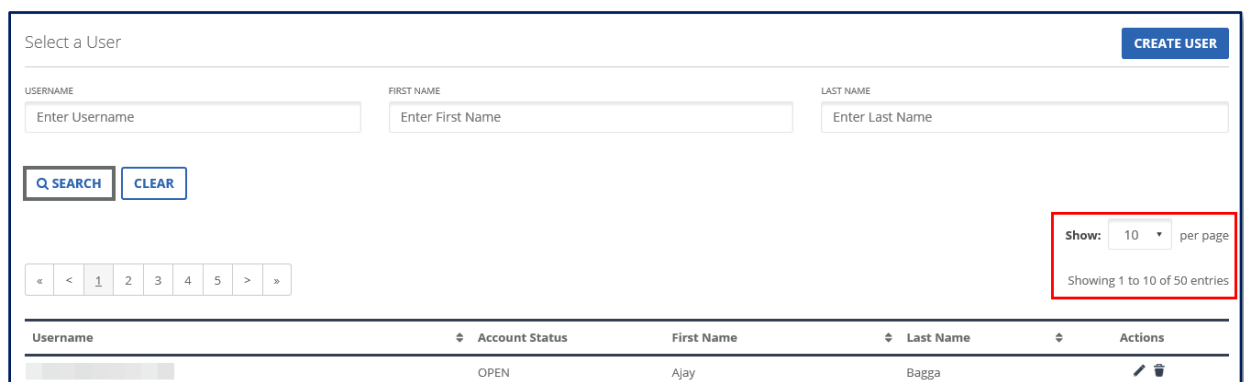
Search for users from the *Manage Users* screen.



1. Click **Security>Manage Users**.
2. Input the appropriate criteria (user name, first name or their last name) in the appropriate fields to filter the results.
3. Press **<Enter>** (on the keyboard) or click **SEARCH**.

If the user is found, their information displays. Depending on the criteria entered, multiple entries can display.

A search can be conducted with no criteria added, resulting in a complete list of users. Press **<Enter>** (on the keyboard) or click **SEARCH**.



Perform additional searches by clicking **CLEAR** and entering new search criteria.

Creating a New User

Create User Screen Overview



The screenshot shows the 'Create User' interface with the following elements and callouts:

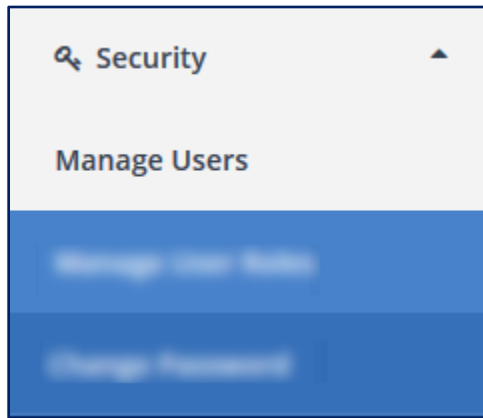
- 1**: USERNAME/EMAIL * input field
- 2**: LAST NAME * input field
- 3**: FIRST NAME * input field
- 4**: LOCKED checkbox
- 5**: AVAILABLE ROLES list (ASST_COOR, COORDINATOR, SECURITY_ADMIN)
- 6**: Role assignment buttons (» > < «)
- 7**: ASSIGNED ROLES list
- 8**: AVAILABLE PRIVILEGES list (Contract/Payer - Add Contract, Dashboard - Access Module, Email Address - Add, Email Address - Delete, Email Address - Update, Exports - Access Module, Holiday - Add, Holiday - Delete, Holiday - Update, Password - Update Expiration Setting, Privilege - Assign Privilege, Privilege - Revoke Privilege)
- 9**: ASSIGNED PRIVILEGES list
- 10**: Assign Supervisors to section, including SEARCH SUPERVISORS input, Assign Supervisors to User (checked), ALL checkbox, and supervisor assignment buttons (> <)
- 11**: CREATE USER button

1. **USERNAME/EMAIL** – This field is to enter a user’s email address, which is also their username.
2. **LAST NAME** – User’s last name.
3. **FIRST NAME** – User’s first name.
4. **LOCKED** – If selected, prevents the user from logging into the system. It is unchecked by default.
5. **AVAILABLE ROLES** – The roles in this field are available for assignment.
6. **Assignment Buttons** – These buttons move items between the **AVAILABLE** and **ASSIGNED** fields.
7. **ASSIGNED ROLES** – The roles in this field are assigned to the user.
8. **AVAILABLE PRIVILEGES** – The privileges in this field are available for assignment.
9. **ASSIGNED PRIVILEGES** – The privileges in this field are assigned to the user.
10. **SUPERVISOR** – This functionality is not used by ODM.
11. **CREATE USER** – Creates the user and adds them in the system.

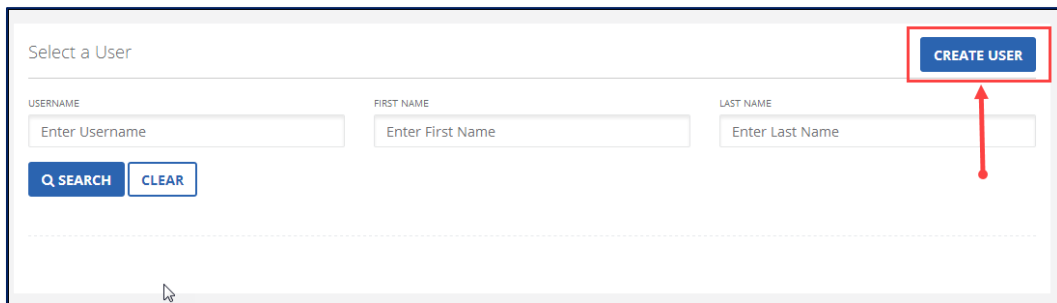


Follow along with the instructor to create a user.

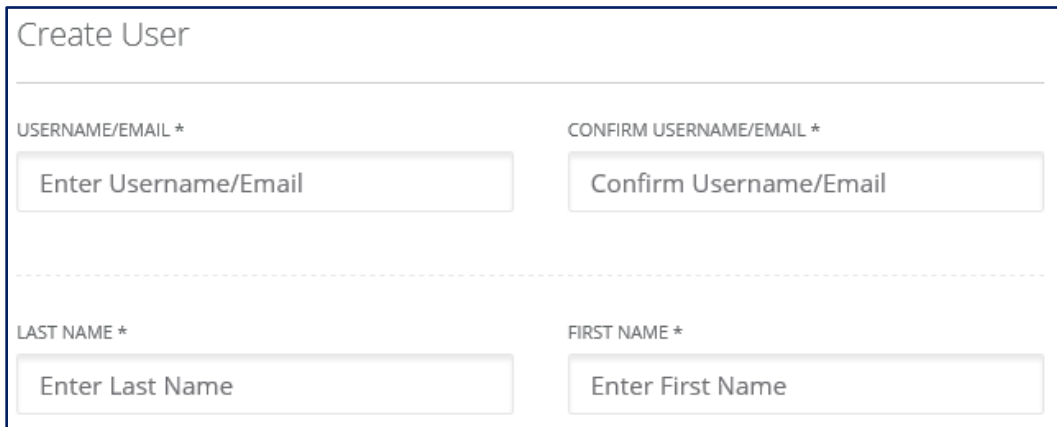
1. Click **Security>Manage Users** from the *Navigation* panel. The *Manage Users* screen displays.



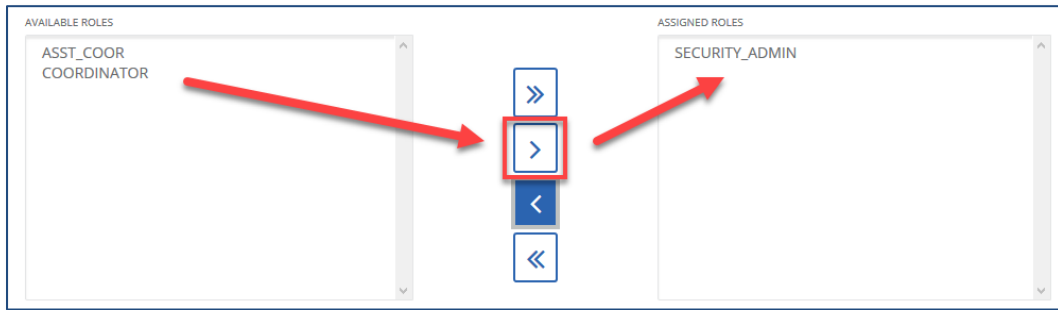
2. Click **CREATE USER**. The *Create User* screen opens.



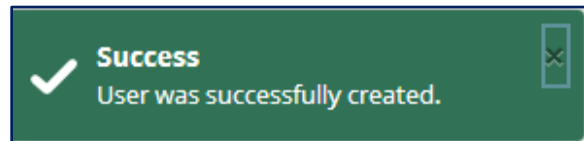
3. Enter/Confirm the user's email address and their **LAST NAME** and **FIRST NAME**.



- The **LOCKED** checkbox prevents the user from logging into the system. Leave this field unchecked to allow the user to log in.
- Click the appropriate item in the **AVAILABLE ROLES** field and click the > button to move it into the **ASSIGNED ROLES** field. All user privileges assigned to the roles selected are granted to the user. Multiple roles can be assigned to a user, as necessary.



- Click the appropriate item in the **AVAILABLE PRIVILEGES** field and click the > button to move it into the **ASSIGNED PRIVILEGES** field.
- Click **CREATE USER**. A successful confirmation message displays.



If a user also provides care to a client, they must be added as an employee in Sandata EVV.



If any of the required fields are not filled out correctly or left blank, a tool tip message displays above the field to be completed.




On Your Own –Create a User

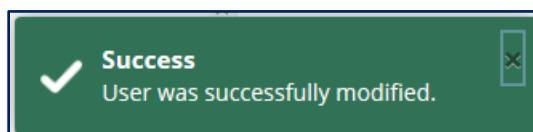
Modify a User



Follow along with the instructor to modify a user.


Modify User Roles/Privileges

1. Perform a user search.
2. Click **Edit**  in the **Actions** column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Add/Remove any of the roles/privileges to modify the user account.
4. Click **MODIFY USER**. A successful confirmation message displays.



Lock/Unlock a User

If a user attempts to log in three (3) times in sequence with an incorrect password, they will be locked out. Follow these steps to unlock the user.


1. Perform a user search.
2. Click **Edit**  in the **Actions** column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Check/Uncheck the **LOCKED** checkbox, as required.
4. Click **MODIFY USER**. A successful confirmation message displays.

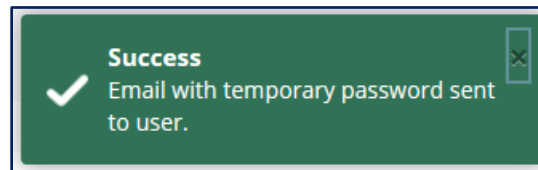
Resetting a User's Password

In addition to the ability to modify a user's information and privileges, the Administrator also has the ability to reset a user's password.



Follow along with the instructor to reset a user's password.


1. Perform a user search.
2. Click **Edit**  in the *Actions* column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Click **RESET PASSWORD**. A message displays indicating a temporary password has been sent to the user.

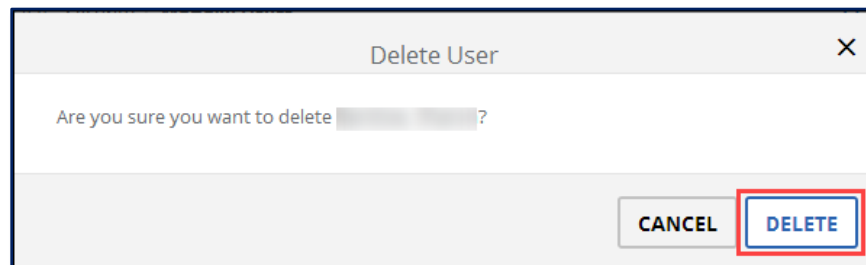


Deleting a User

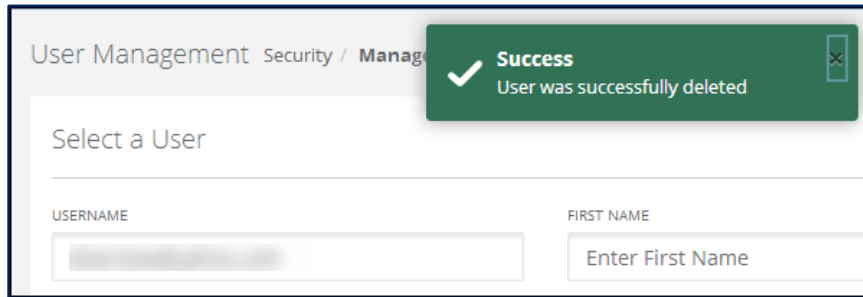


Follow along with the instructor to delete a user.

1. Perform a user search.
2. Click **Delete**  in the *Actions* column on the right-hand side of the screen of the appropriate user. The *Delete User* confirmation box displays.



3. Click **Delete**. A successful confirmation box displays.



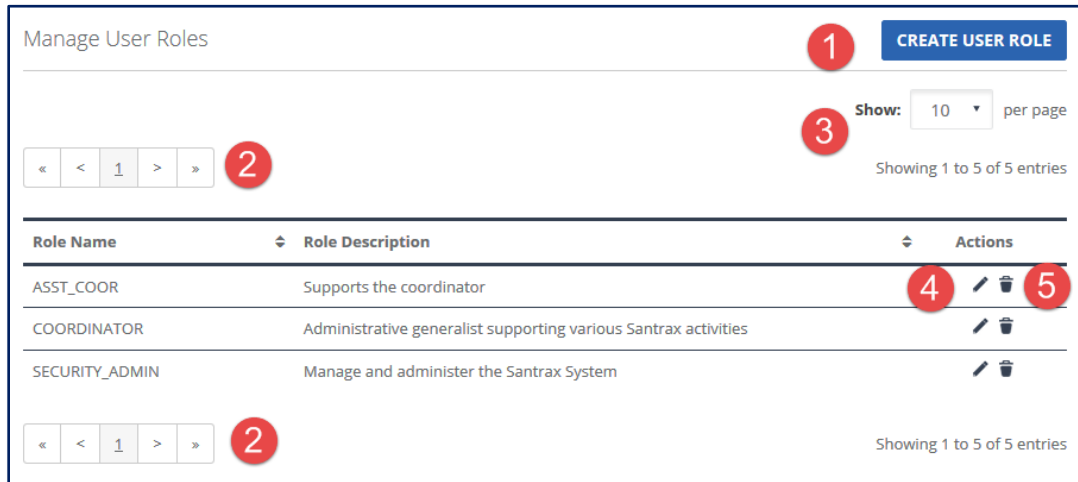
Manage User Roles

The use of roles allows Administrators with the SECURITY_ADMIN role to tailor a set of system functions for each job title in the organization to make maintenance of user access easier. Whenever a role is edited, it affects **all** users who have been assigned to that role.

Sandata EVV includes a standard set of roles across all agencies. The roles are:

Default Role	Description
ASST_COOR (Assistant Coordinator)	Sandata EVV generalist that supports the coordinator. This role has view-only access to visit records and the ability to run reports.
COORDINATOR	This role has privileges to Intake/manage clients, intake/manage employees and clear visit exceptions.
SECURITY_ADMIN	This role has privileges to create/manage all EVV users, create/manage security roles, reset passwords, Intake/manage clients, intake/manage employees and clear visit exceptions.

Screen Overview

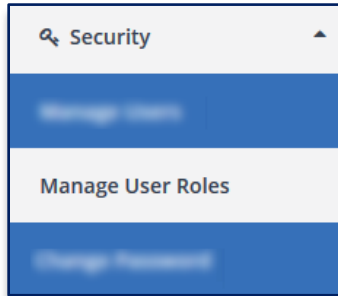


The screenshot shows the 'Manage User Roles' interface. At the top right, there is a blue button labeled 'CREATE USER ROLE' (1). Below it, a 'Show:' dropdown menu is set to '10' per page (3), with the text 'Showing 1 to 5 of 5 entries' below it. On the left, there are navigation buttons: '<<', '<', '1', '>', '>>' (2). The main content is a table with three columns: 'Role Name', 'Role Description', and 'Actions'. The table contains three rows: 'ASST_COOR' (Supports the coordinator), 'COORDINATOR' (Administrative generalist supporting various Santrax activities), and 'SECURITY_ADMIN' (Manage and administer the Santrax System). The 'Actions' column for each row contains an edit icon (4) and a delete icon (5). At the bottom, there are more navigation buttons (2) and the text 'Showing 1 to 5 of 5 entries'.

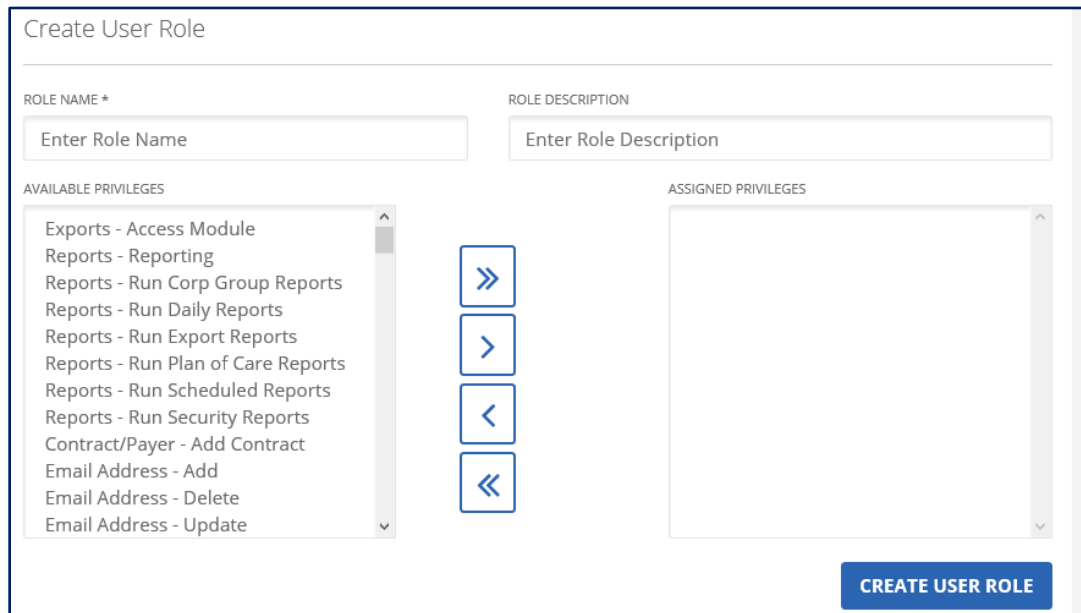
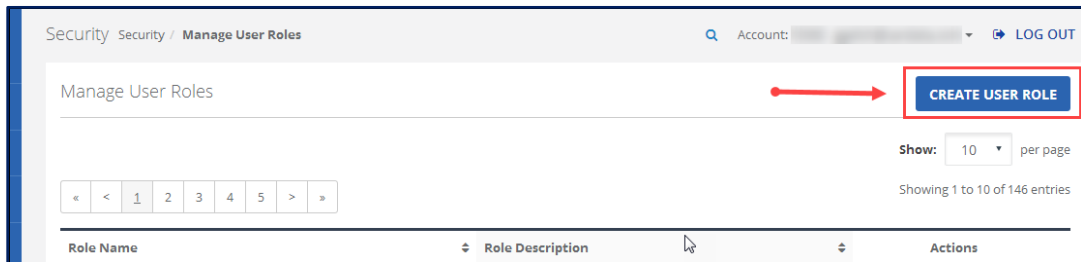
1. **Create User Role** – Used to create a new user role.
2. **Page Navigation** – Dependent upon the number of results, there can be 1 or multiple pages.
3. **Show** – Allows for input of how many entries are shown per page and displays the total number of results returned.
4. **Edit** – Edit a user.
5. **Delete icon** – Delete a user.

Creating New User Role

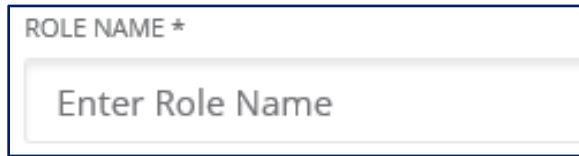
1. Click **Manage User Roles**. The *Manage User Roles* screen displays.



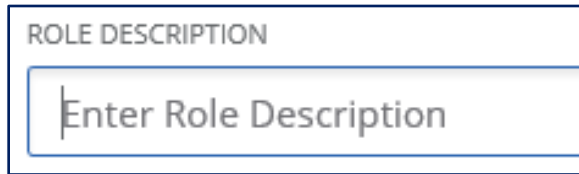
2. Click **CREATE USER ROLE**. The Create User Role screen opens.



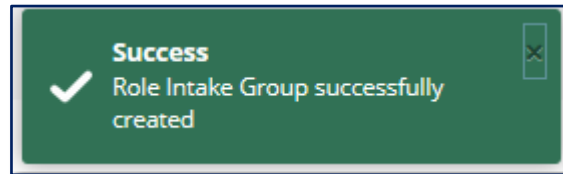
3. Enter a name for the new role in the **ROLE NAME*** field.




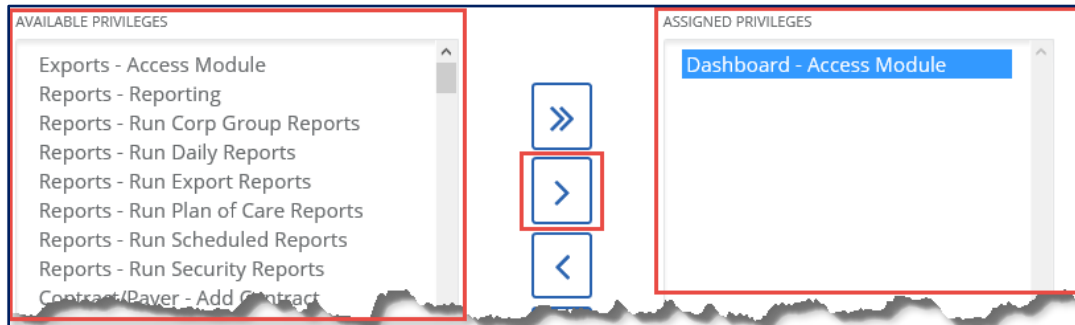
4. Enter a brief description in the **ROLE DESCRIPTION** field.



5. Click **CREATE USER ROLE**. A successful confirmation message displays.



6. Click **Manage User Roles** from the *Navigation* panel.
7. Click **Edit**  on the newly created role.
8. Select the privilege(s) to be assigned to the new role in the **AVAILABLE PRIVILEGES** field.

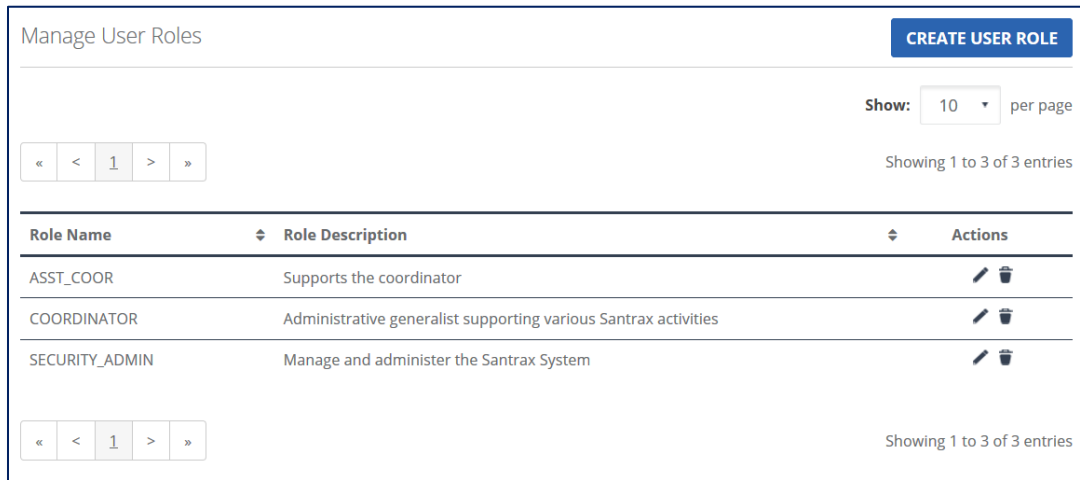



9. Click **MODIFY USER ROLE** to save the assigned privileges.

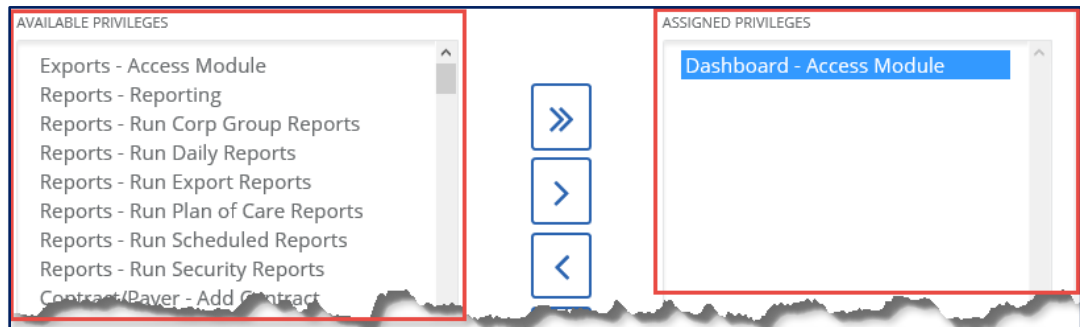
Modifying Roles

Making changes to a role impacts all users with that role assignment the next time they log in to the system.

1. Scroll through the list of roles and find the role to be edited.



2. Click **Edit**  in the **Actions** column on the right-hand side of the screen of the role to be modified. The *Modify User Role* screen opens.
3. Add (**AVAILABLE PRIVILEGES**) or remove (**ASSIGNED PRIVILEGES**), as necessary.

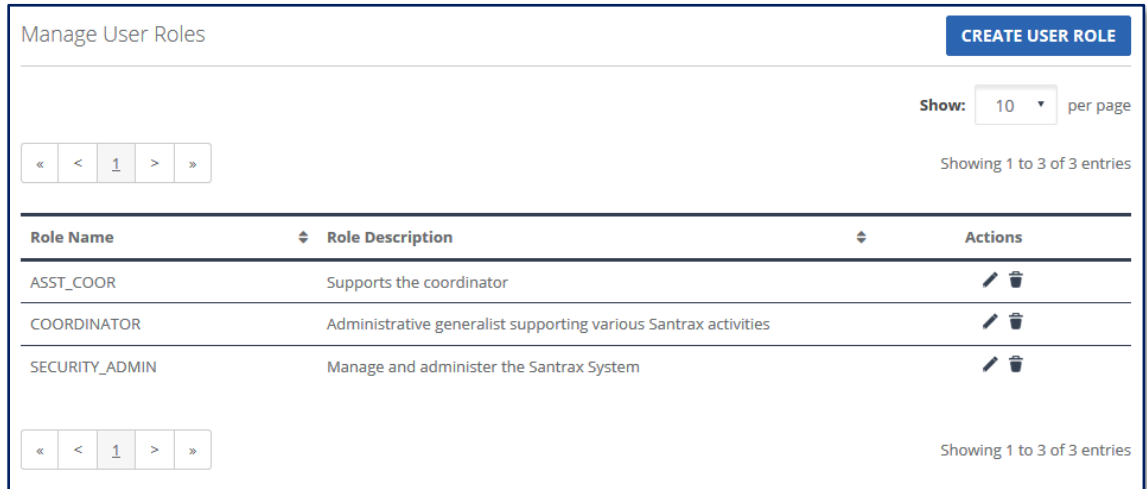


4. Click **MODIFY USER ROLE**. If successful, a confirmation message displays.









Deleting Roles


1. Scroll through the list of roles and find the role to be deleted.

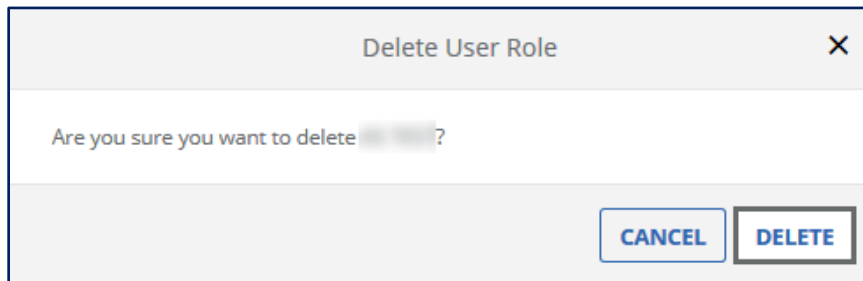


The screenshot shows the 'Manage User Roles' interface. At the top right is a 'CREATE USER ROLE' button. Below it is a 'Show: 10 per page' dropdown and 'Showing 1 to 3 of 3 entries'. A table lists three roles:

Role Name	Role Description	Actions
ASST_COOR	Supports the coordinator	 
COORDINATOR	Administrative generalist supporting various Santrax activities	 
SECURITY_ADMIN	Manage and administer the Santrax System	 

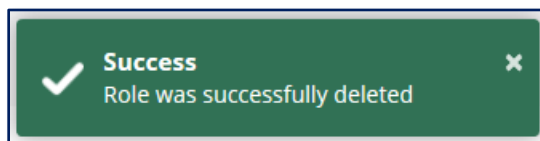
At the bottom, there are pagination controls and 'Showing 1 to 3 of 3 entries'.

2. Click **DELETE**  in the **Actions** column on the right-hand side of the screen of the appropriate role. The *Delete User Role* confirmation box displays.



The dialog box is titled 'Delete User Role' and contains the text: 'Are you sure you want to delete [redacted]?' At the bottom right are two buttons: 'CANCEL' and 'DELETE'.

3. Click **DELETE**. A successful confirmation box displays.



The success message is displayed in a green box with a checkmark icon and the text: 'Success Role was successfully deleted'.

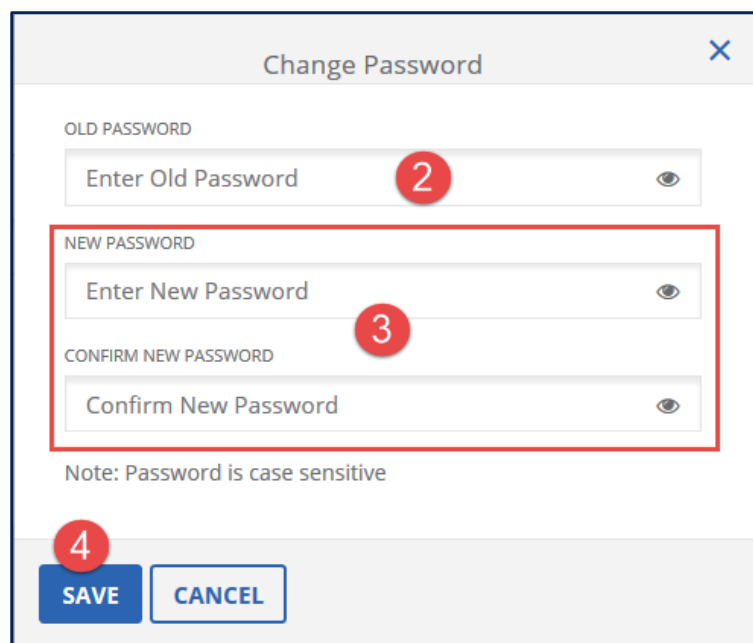
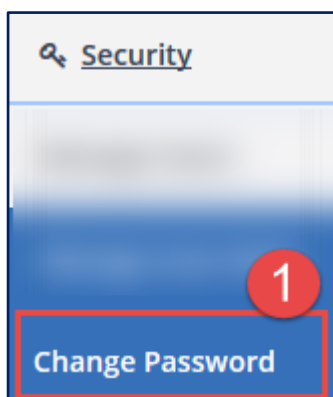
Change Password

Resetting Your Own Password

Change Password allows the logged in user to change his/her password.



To change another user's password, see the sub-section on this topic in the **Modifying a User** section of this document.



A screenshot of the 'Change Password' dialog box. It contains three input fields: 'OLD PASSWORD' (labeled '2'), 'NEW PASSWORD' (labeled '3'), and 'CONFIRM NEW PASSWORD'. The 'NEW PASSWORD' and 'CONFIRM NEW PASSWORD' fields are enclosed in a red box. Below the fields is a note: 'Note: Password is case sensitive'. At the bottom, there are 'SAVE' and 'CANCEL' buttons, with a red circle and the number '4' next to the 'SAVE' button.

1. Click **Change Password** from the main **Security** menu. The *Change Password* panel opens.
2. Enter your current password in the **OLD PASSWORD** field.
3. Enter your new password in the **NEW PASSWORD** field; type it again in the **CONFIRM NEW PASSWORD** field.
4. Click **SAVE**.

4 Data Entry

Module Time

45 minutes

This lesson introduces the process of how clients and employees are input and maintained in Sandata EVV.

Module Objectives

After completing this lesson, you will be able to:

- search for a client;
- add a client's record;
- update a client's record;
- delete/close a client's record;
- search for an employee record;
- add an employee record;
- update an employee record; and
- delete/close an employee record.

Key Terminology

Term/Acronym	Definition
Client/Individual	A person who receives services through the Medicaid program
Employee/Direct Care Worker	A person who is employed by an agency provider to provide care to one or more clients

Introduction

The *Data Entry* module allows system users to maintain client and employee records.

Accessing Data Entry Module

A system user with the appropriate permissions will see the *Data Entry* link listed in the *Navigation* panel on the left side of the screen. Clicking on the link will expand the section to show **Clients** and **Employees** options.

Client Data

Search for a Client

Best practice is to perform a search to see if the client already exists in Sandata EVV to prevent duplicate client records.

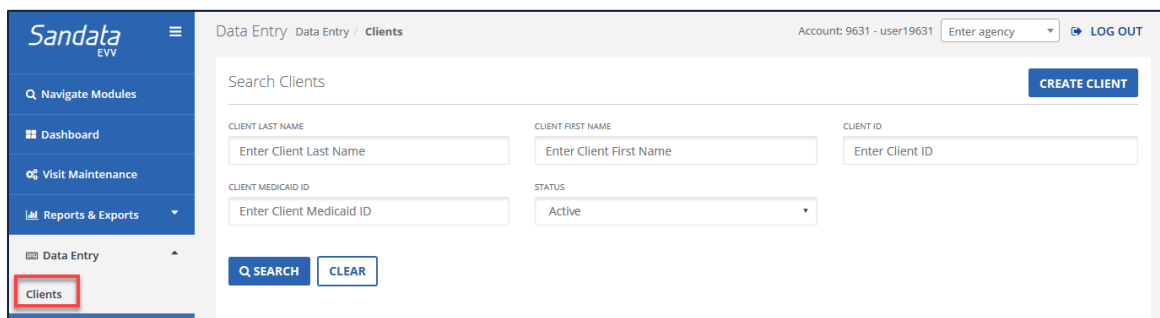


The system prevents duplicate client entry based on the Client ID/Medicaid ID



Watch as the instructor demonstrates how to search for a client

1. Click **Data Entry>Clients** from the *Navigation* panel. The *Data Entry / Clients* search screen displays.



2. Enter values either in the **CLIENT LAST NAME**, **CLIENT FIRST NAME**, **CLIENT ID**, **CLIENT MEDICAID ID** or **STATUS** field, or a combination of the five (5).
3. Click **SEARCH**. Any matching results are displayed at the bottom of the screen.



If multiple search values are entered, Sandata EVV attempts to match against all exact values entered.
Searching with no criteria selected displays a complete list of all active clients.

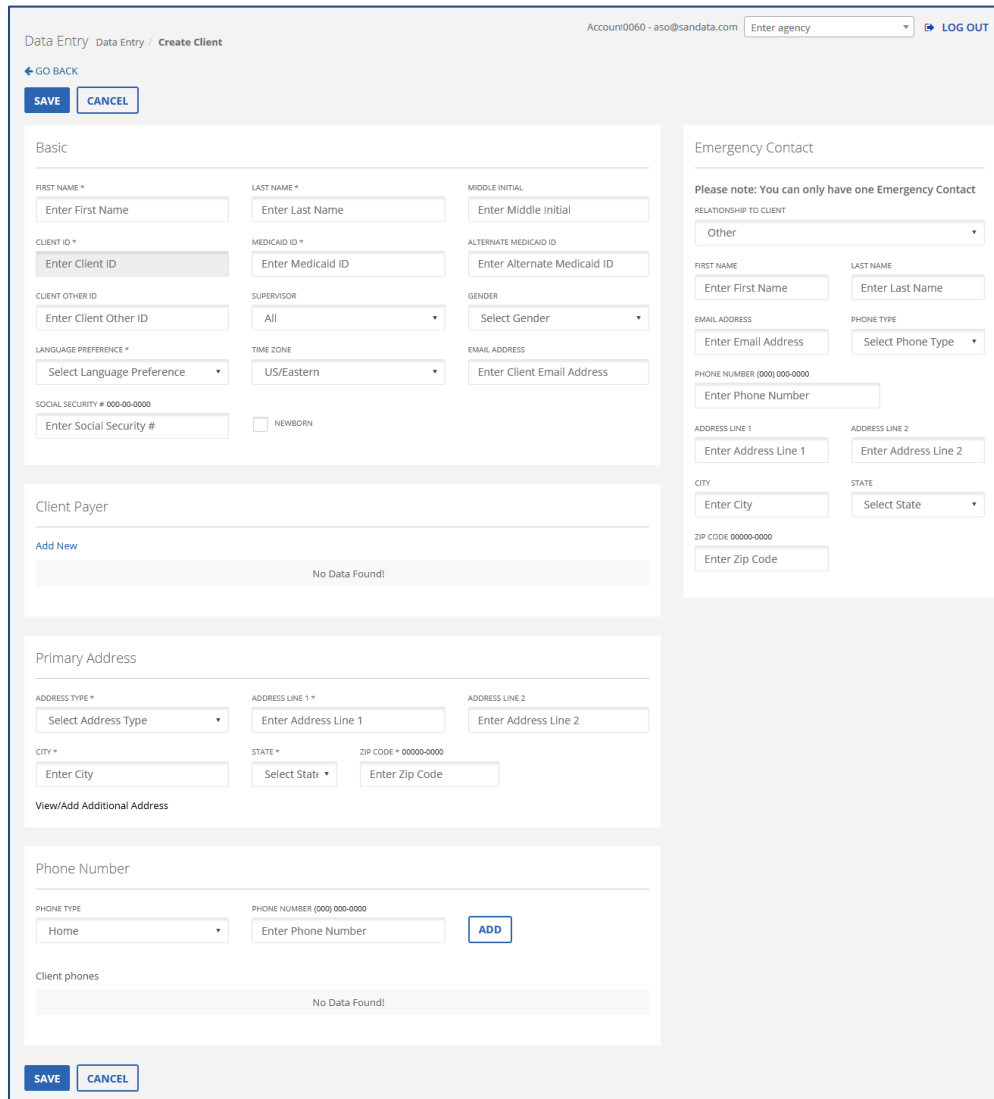
Create New Client(s)

To create a new client, the **FIRST NAME***, **LAST NAME***, **MEDICAID ID*** (12 digits), **LANGUAGE PREFERENCE*** and any known addresses at which the client can routinely receive care are required fields. Enter the information into the *Create New Client* screen. The required fields are indicated with an asterisk (*) to the right of the field. All other fields on the screen are optional and not necessary in order to save the new client record.

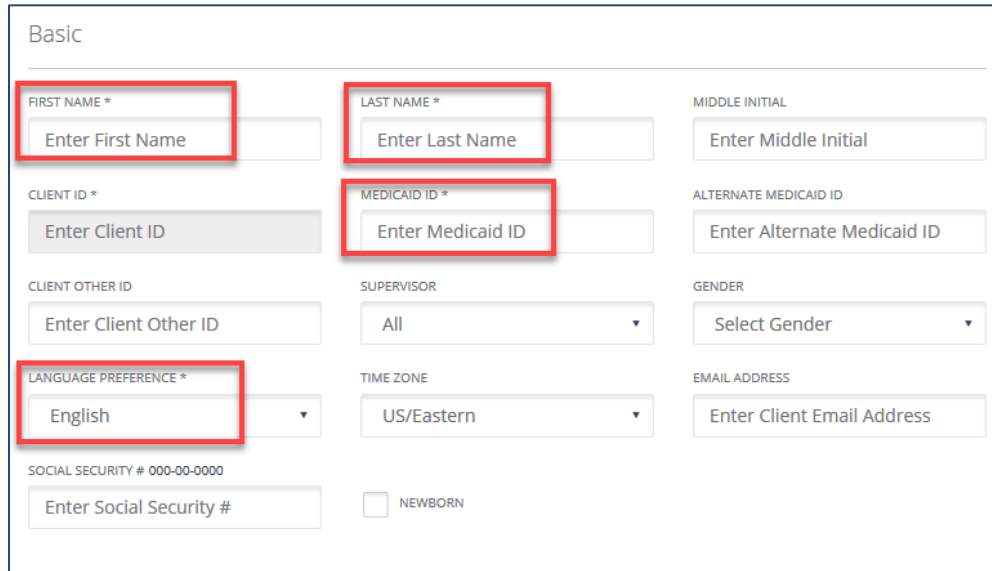


Watch as the instructor demonstrates how to create a client.

1. Click **CREATE NEW CLIENT**. The *Create Client* screen opens.



2. Enter **FIRST NAME, LAST NAME, MEDICAID ID** (not required if the **NEWBORN** indicator on the screen is checked) and **LANGUAGE PREFERENCE**.



The screenshot shows a 'Basic' form with the following fields and values:

- FIRST NAME *: Enter First Name
- LAST NAME *: Enter Last Name
- MIDDLE INITIAL: Enter Middle Initial
- CLIENT ID *: Enter Client ID
- MEDICAID ID *: Enter Medicaid ID
- ALTERNATE MEDICAID ID: Enter Alternate Medicaid ID
- CLIENT OTHER ID: Enter Client Other ID
- SUPERVISOR: All
- GENDER: Select Gender
- LANGUAGE PREFERENCE *: English
- TIME ZONE: US/Eastern
- EMAIL ADDRESS: Enter Client Email Address
- SOCIAL SECURITY # 000-00-0000: Enter Social Security #
- NEWBORN:

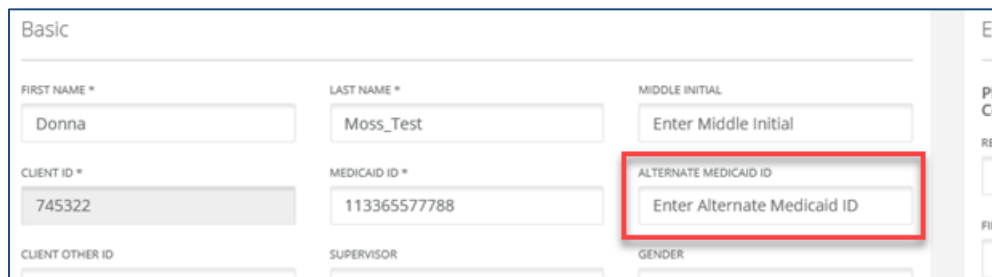
For newborn clients, while the newborn Medicaid ID is pending, the newborn number provided by the payer should be entered in Client Payer ID field within the Add/Edit Payer screen that will be shown later in the training. Once the Medicaid ID is received, it must be entered in the client record. You will not need to remove this number.



The mother's Medicaid ID should NOT be used if the newborn does not have a Medicaid ID yet.

In the event a client receives a new Medicaid ID, enter the new ID in the **ALTERNATE MEDICAID ID** field.

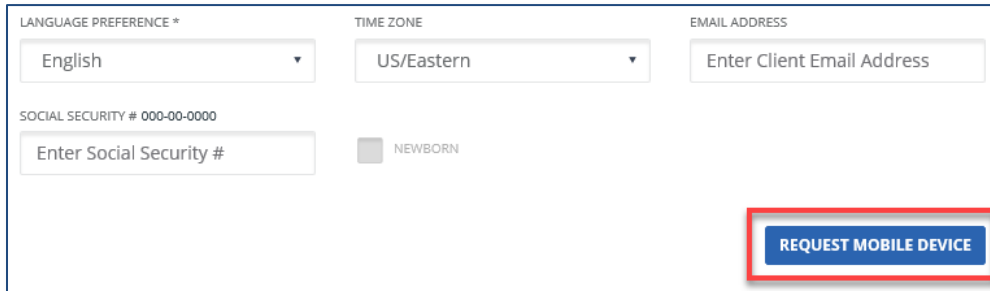
For example, coverage lapses or adoptions. In general, any instance which causes a new Medicaid ID to be created for an individual, the new Medicaid ID should be entered in the Alternate Medicaid ID field.



The screenshot shows the 'Basic' form with the following fields and values:

- FIRST NAME *: Donna
- LAST NAME *: Moss_Test
- MIDDLE INITIAL: Enter Middle Initial
- CLIENT ID *: 745322
- MEDICAID ID *: 113365577788
- ALTERNATE MEDICAID ID: Enter Alternate Medicaid ID
- CLIENT OTHER ID: [Empty]
- SUPERVISOR: [Empty]
- GENDER: [Empty]

A **REQUEST MOBILE DEVICE** button is also available in the *Basic* section of the client screen to submit a request for an EVV Device for the client. This process is explained in detail in the *eTRAC & EVV Device Management* module of this guide.



LANGUAGE PREFERENCE *
 English

TIME ZONE
 US/Eastern

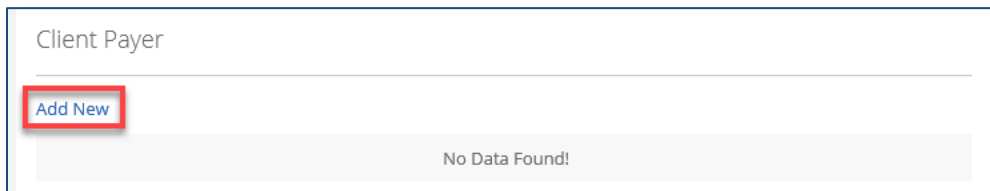
EMAIL ADDRESS
 Enter Client Email Address

SOCIAL SECURITY # 000-00-0000
 Enter Social Security #

NEWBORN

REQUEST MOBILE DEVICE

3. In the Client Payer section, click **ADD NEW** to add Payer information (required).

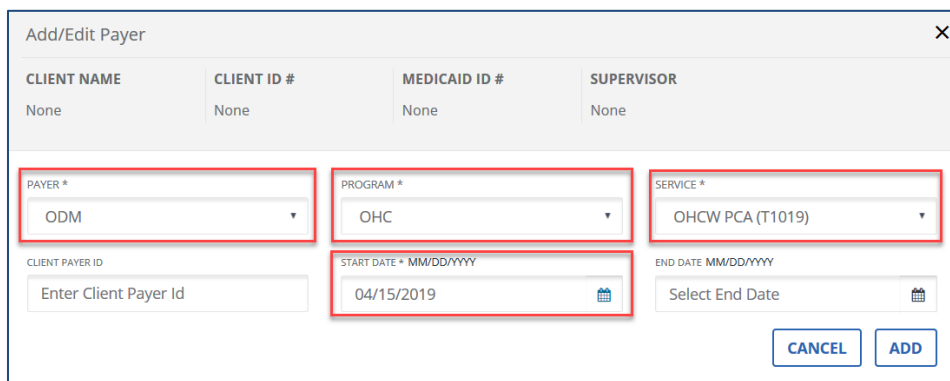


Client Payer

Add New

No Data Found!

- a. Click in the **PAYER** drop-down to select a payer.
- b. Click in the **PROGRAM** drop-down to select a program. The available options are determined by the chosen payer.
- c. Click in the **SERVICE** drop-down to select a service. The available options are determined by the chosen payer and program.
- d. Enter the **CLIENT PAYER ID** if necessary. For ODA clients, enter the Passport Information Management System (PIMS) ID in the Client Payer ID field. The Medicaid ID is one of the fields that is used to match a claim. Once the Medicaid ID is received, it must be entered into the client entry screen.
- e. Select a **START DATE**.
- f. Select an **END DATE** if known.



Add/Edit Payer

CLIENT NAME	CLIENT ID #	MEDICAID ID #	SUPERVISOR
None	None	None	None

PAYER *
 ODM

PROGRAM *
 OHC

SERVICE *
 OHCW PCA (T1019)

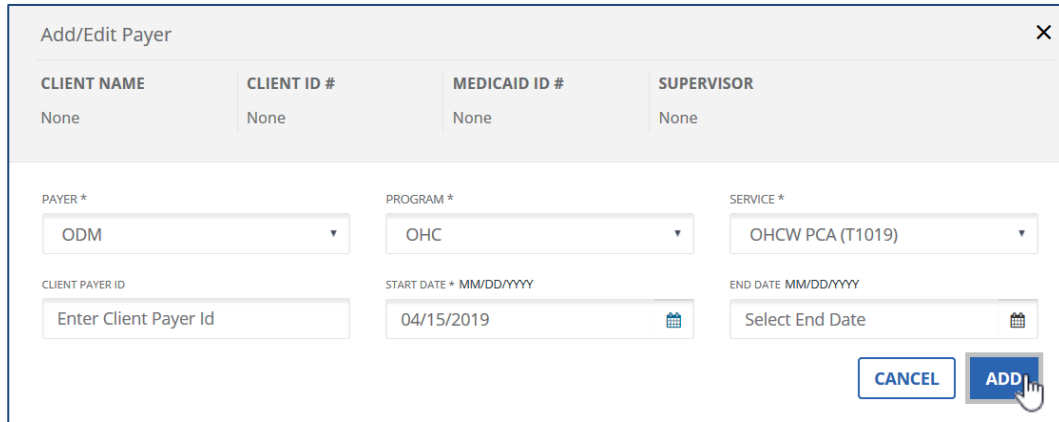
CLIENT PAYER ID
 Enter Client Payer Id

START DATE * MM/DD/YYYY
 04/15/2019

END DATE MM/DD/YYYY
 Select End Date

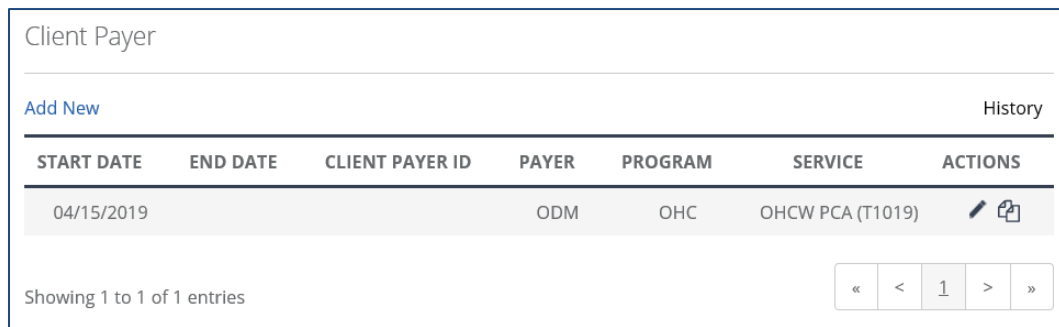
CANCEL ADD


4. Click **ADD**.



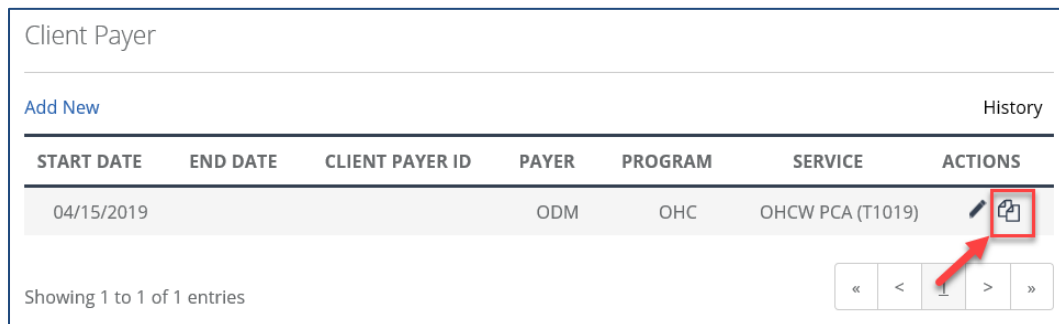

Upon clicking **ADD**, the Payer information is added to the record and the Payer fields are cleared. The Add/Edit Payer screen remains open, ready for additional payers to be entered. Click the 'X' in the upper-right corner to close the window.


5. The Client Payer section shows the added payer.



START DATE	END DATE	CLIENT PAYER ID	PAYER	PROGRAM	SERVICE	ACTIONS
04/15/2019			ODM	OHC	OHCW PCA (T1019)	

6. To add another service for the same payer or add another payer to the client, click the **Copy Payer** icon to the right of the line.



START DATE	END DATE	CLIENT PAYER ID	PAYER	PROGRAM	SERVICE	ACTIONS
04/15/2019			ODM	OHC	OHCW PCA (T1019)	

a. Update the **PAYER**, **PROGRAM** and **SERVICE** fields as needed and click **ADD**.

PAYER * PROGRAM * SERVICE *
 CLIENT PAYER ID START DATE * MM/DD/YYYY END DATE MM/DD/YYYY

b. The additional payer information is added to the client record.

Client Payer

[Add New](#) History

START DATE	END DATE	CLIENT PAYER ID	PAYER	PROGRAM	SERVICE	ACTIONS
04/15/2019			ODM	OHC	OHCW PCA (T1019)	
04/15/2019			ODM	SP	SPHH Aide (G0156)	

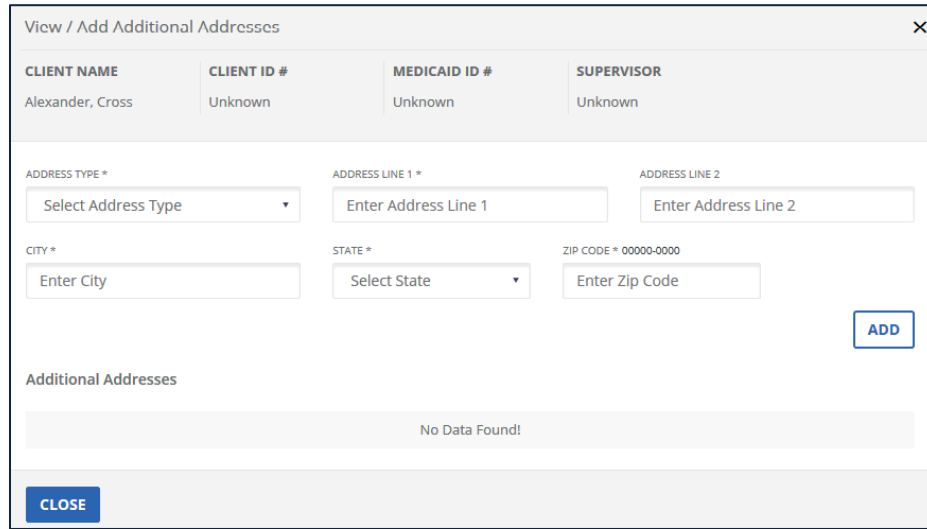
7. Enter client’s **Primary Address**. (Required)

Primary Address

ADDRESS TYPE * ADDRESS LINE 1 * ADDRESS LINE 2
 CITY * STATE * ZIP CODE * 00000-0000
[View/Add Additional Address](#)



If a client has more than one address where he or she can receive care, click the **View/Add Additional Addresses** link to add the additional address(s). This allows the system to validate call times against the additional addresses to aid in minimizing visit exceptions.



8. Select **PHONE TYPE**. Enter client’s **PHONE NUMBER**. (Optional)



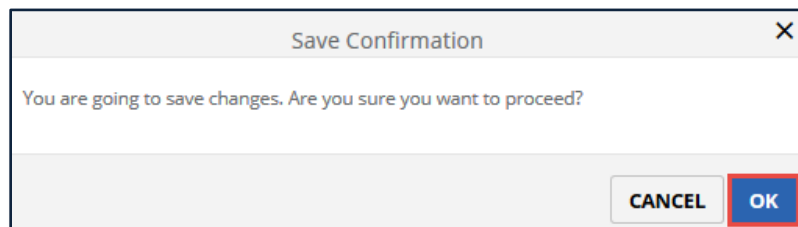
If a phone type is selected, a phone number **must** be added.

If a client has more than one phone number, including a cell phone, from which the employee can call-in and call-out, the additional phone number(s) should be added to the client record. Sandata EVV validates call-in and call-out times against all phone numbers listed in the client record, minimizing visit exceptions.

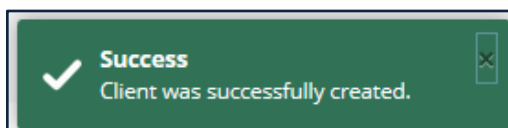
9. Click **ADD**. The phone number is added and marked as primary. (Optional)

10. Enter **Emergency Contact** information for the client. (Optional)

11. Click **SAVE**. The *Save Confirmation* dialog box displays.



12. Click **OK**. The client is added to the system.



**Exercise: Create a client**

Modifying Client Data

Modifying a client’s data allows updates to the information, as necessary. Any updates made for the client is effective from the time the change is made. The information previously available continues to be in effect for all calls and visits prior to the change. In other words, changes are not retroactive.

Updating Medicaid ID

When the **NEWBORN** indicator box is checked, the Medicaid ID field becomes optional and non-editable. When a newborn client receives a Medicaid ID, the **NEWBORN** box can be unchecked, opening the Medicaid ID field allowing entry of the Medicaid ID.

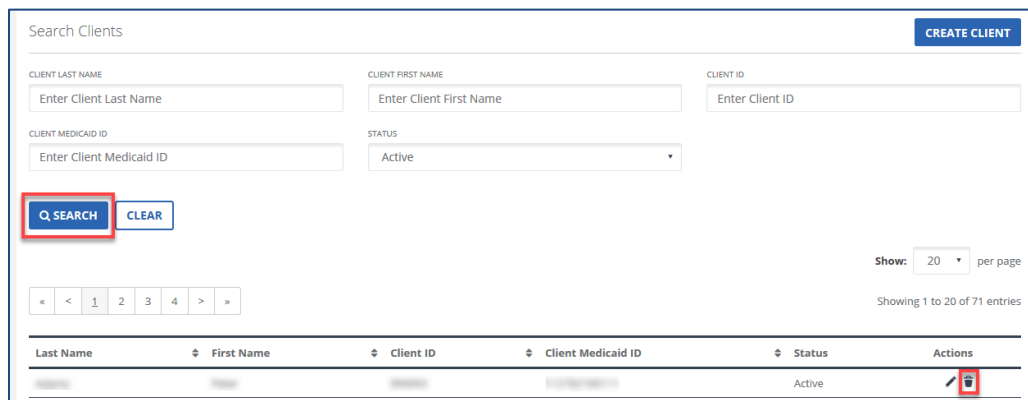
Deleting Clients

Use the **Delete** option to remove client data from Sandata EVV going forward. Deleting a client makes the record inactive. Clients cannot be deleted with a future date. Any activity already captured will continue to reference the client’s previous information. When a client is deleted, no activity will be allowed on that client record, including call-in and call-outs or client record modifications. In other words, deletion is not retroactive.



Watch as the instructor demonstrates how to delete a client.

1. Search for a client.



Search Clients CREATE CLIENT

CLIENT LAST NAME: Enter Client Last Name

CLIENT FIRST NAME: Enter Client First Name

CLIENT ID: Enter Client ID


CLIENT MEDICAID ID: Enter Client Medicaid ID


STATUS: Active

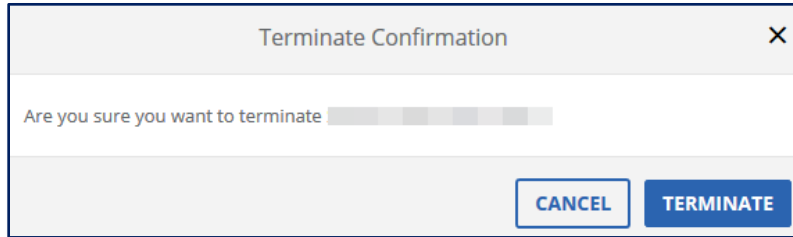
SEARCH CLEAR

Show: 20 per page

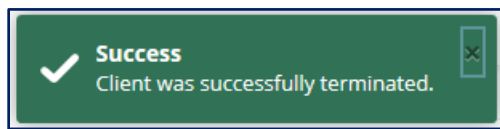
Showing 1 to 20 of 71 entries

Last Name	First Name	Client ID	Client Medicaid ID	Status	Actions
				Active	

- Click **Terminate** () to the right of the selected client's name. The *Terminate Confirmation* dialog box displays.



- Click **TERMINATE**. A successful confirmation displays.



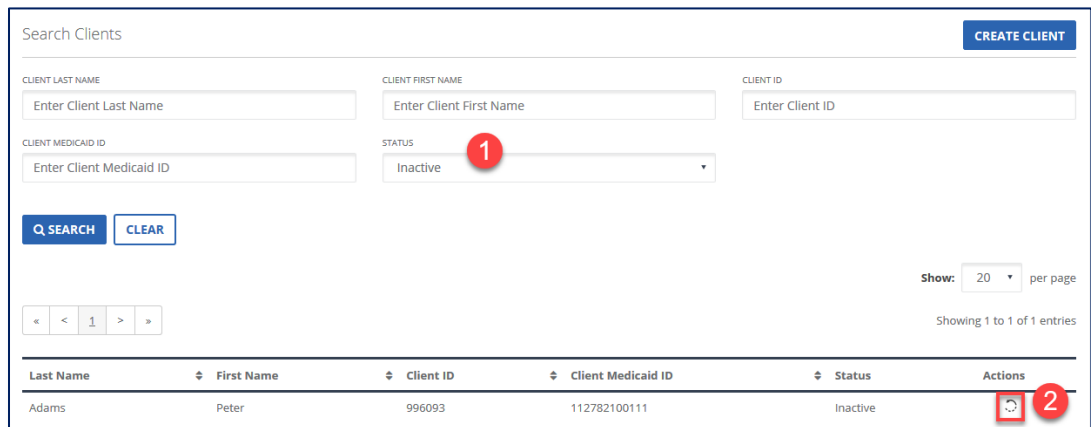
Reactivating Clients


A client can also be reactivated. Search for clients with the status of **Inactive** and click the **Reactivate** button to the right of the selected client.



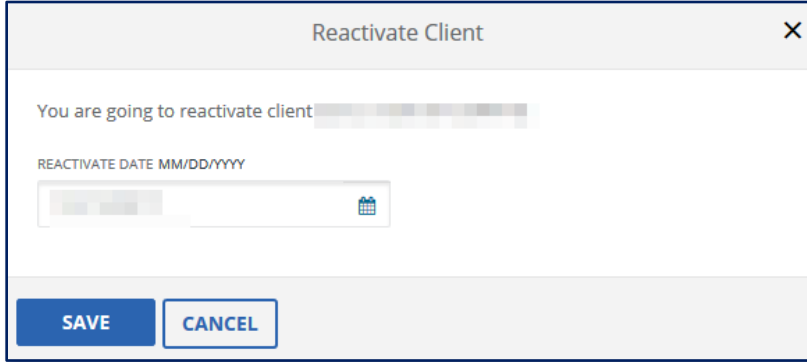
Watch as the instructor demonstrates how to reactivate a client.

- Search for a client with the status of **Inactive**.

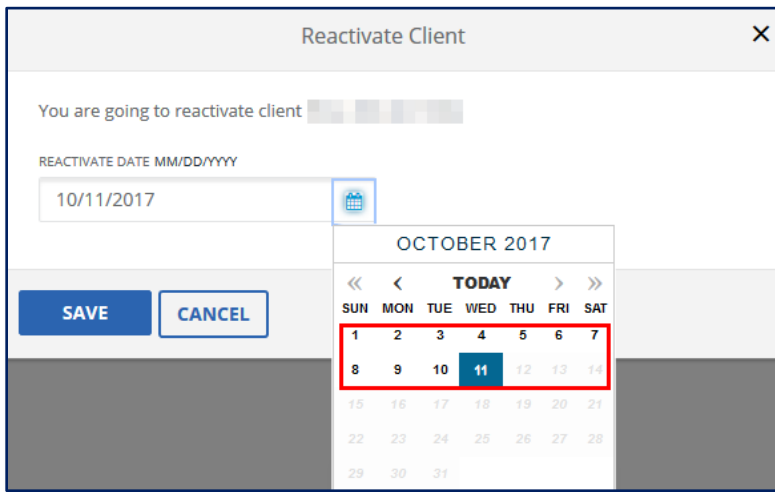


Last Name	First Name	Client ID	Client Medicaid ID	Status	Actions
Adams	Peter	996093	112782100111	Inactive	

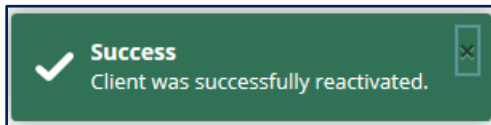
- Click **Reactivate** (↺) to the right of the selected client’s name. The *Reactivate Client* confirmation dialog box displays.



- Select a **REACTIVATE DATE**. The date defaults to the current day’s date. A client can be reactivated up to the date they were originally deleted.



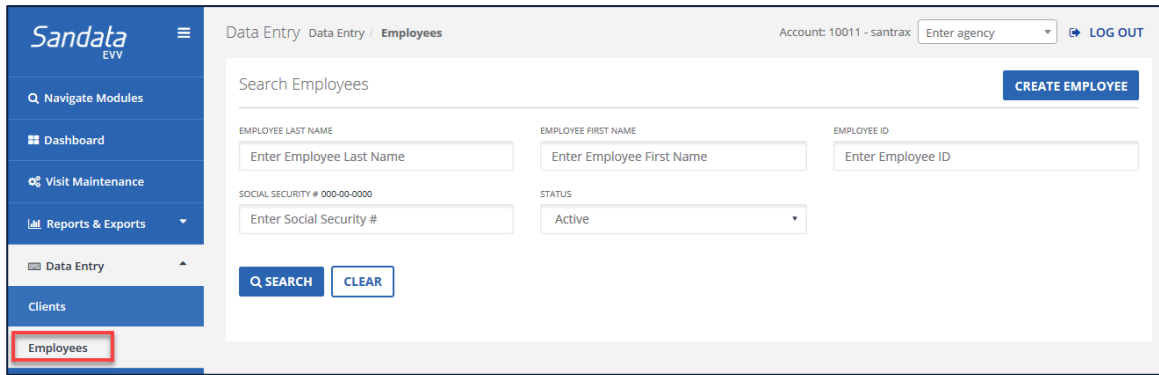
- Click **SAVE**. A successful confirmation dialog box displays.




Exercise: Delete/Reactivate a Client

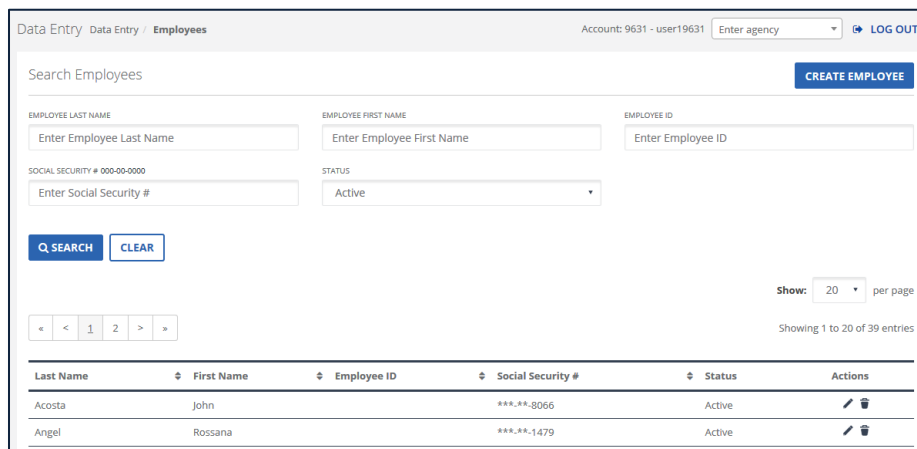
Employee Data





Search for an Employee




Watch as the instructor demonstrates how to search for an employee.

1. Click **Data Entry>Employees** from the *Navigation* panel. The *Data Entry / Employees* search screen displays.
2. Enter values either in the **EMPLOYEE ID**, if used, **EMPLOYEE FIRST NAME** or **EMPLOYEE LAST NAME** field, or a combination of the three (3).
3. Click **SEARCH**. Any matching results are displayed at the bottom of the screen.



Last Name	First Name	Employee ID	Social Security #	Status	Actions
Acosta	John		***.**-8066	Active	 
Angel	Rossana		***.**-1479	Active	 

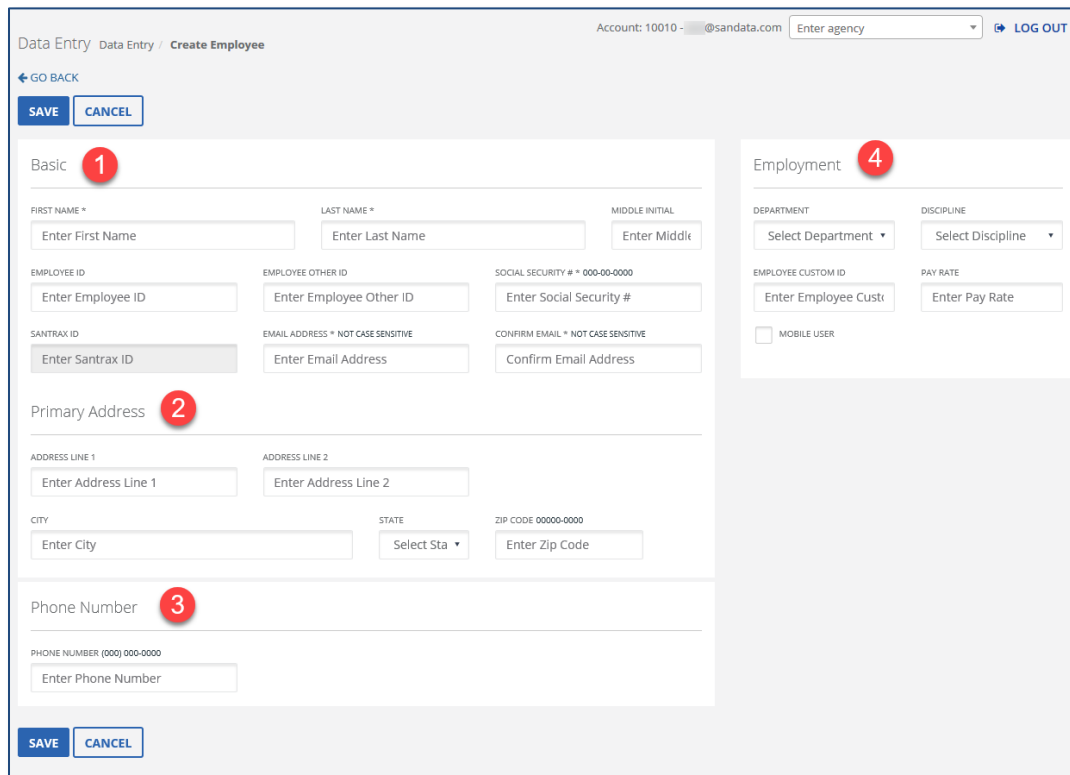


If multiple search values are entered, Sandata EVV attempts to match against all exact values entered.

Searching with no criteria selected displays a complete list of all active employees.

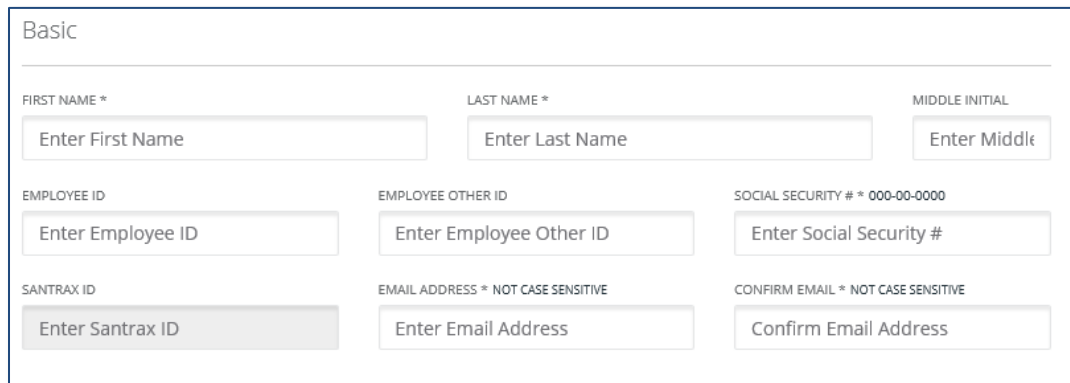
Create New Employee(s)

To create a new employee, at a minimum, the **FIRST NAME***, **LAST NAME***, **SOCIAL SECURITY** Number and an **EMAIL ADDRESS*** are required. Enter the information into the *Data Entry / Create Employee* screen. Required fields are indicated with an asterisk (*) to the right of the field.



The *Data Entry / Create Employee* screen is made up of the following sections.

1. **Basic** – At a minimum, **FIRST NAME**, **LAST NAME**, **SOCIAL SECURITY** number and **EMAIL ADDRESS** are required fields.





The SANTRAX ID is automatically created by the system upon saving the employee record. The SANTRAX ID is entered by the employee as their unique ID for EVV Telephony calls.

2. **Primary Address** – Address of the employee. (Optional)

Primary Address

ADDRESS LINE 1 ADDRESS LINE 2

CITY STATE ZIP CODE 00000-0000

3. **Phone Number**. (Optional)

Phone Number

PHONE NUMBER (000) 000-0000

4. **Employment** – The **MOBILE USER** box must be checked in order for the system to create a temporary password for the employee to use SMC to call-in/call-out.

Employment

DEPARTMENT DISCIPLINE

EMPLOYEE CUSTOM ID PAY RATE

MOBILE USER



When **MOBILE USER** is checked and the record is saved, an email is sent to the employee with their temporary SMC password. The temporary password is valid for 60 days. If the temporary password expires, the employee can tap the 'Forgot Password' link on the SMC Login screen to reset the temporary password.

5. **SAVE/CANCEL.**



Follow along with the instructor to create a new employee.

1. Click **CREATE NEW EMPLOYEE**. The *Data Entry / Create Employee* screen opens.
2. In the *Basic* section, enter **FIRST NAME, LAST NAME, SOCIAL SECURITY #** and **EMAIL ADDRESS**.

Basic

FIRST NAME *	LAST NAME *	MIDDLE INITIAL
<input type="text" value="Enter First Name"/>	<input type="text" value="Enter Last Name"/>	<input type="text" value="Enter Middk"/>
EMPLOYEE ID	EMPLOYEE OTHER ID	SOCIAL SECURITY # * 000-00-0000
<input type="text" value="Enter Employee ID"/>	<input type="text" value="Enter Employee Other ID"/>	<input type="text" value="Enter Social Security #"/>
SANTRAX ID	EMAIL ADDRESS * NOT CASE SENSITIVE	CONFIRM EMAIL * NOT CASE SENSITIVE
<input type="text" value="Enter Santrax ID"/>	<input type="text" value="Enter Email Address"/>	<input type="text" value="Confirm Email Address"/>

3. Enter employee's **Primary Address**. (Optional)

Primary Address

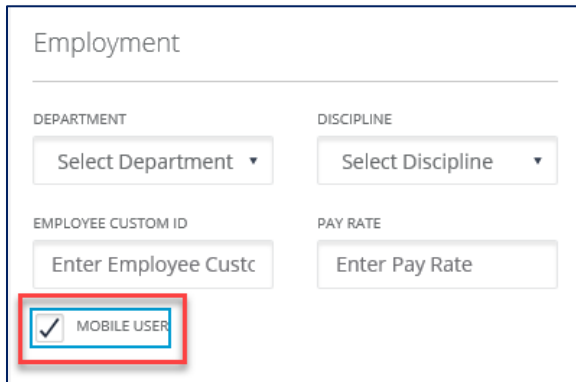
ADDRESS LINE 1	ADDRESS LINE 2	
<input type="text" value="7303 Scottsdale Circle"/>	<input type="text" value="Enter Address Line 2"/>	
CITY	STATE	ZIP CODE 00000-0000
<input type="text" value="Mentor"/>	<input type="text" value="OH"/> ▼	<input type="text" value="44060"/>

4. Enter employee's **Phone Number**. (Optional)

Phone Number

PHONE NUMBER (000) 000-0000

5. In the *Employment* section, check the **MOBILE USER** box.

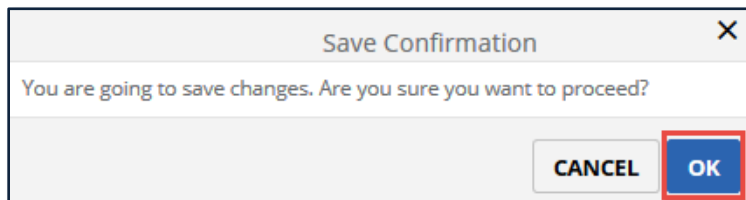


The screenshot shows the 'Employment' section of a form. It contains several input fields: 'DEPARTMENT' (dropdown menu), 'DISCIPLINE' (dropdown menu), 'EMPLOYEE CUSTOM ID' (text input), and 'PAY RATE' (text input). At the bottom, there is a checkbox labeled 'MOBILE USER' which is checked and highlighted with a red rectangular box.



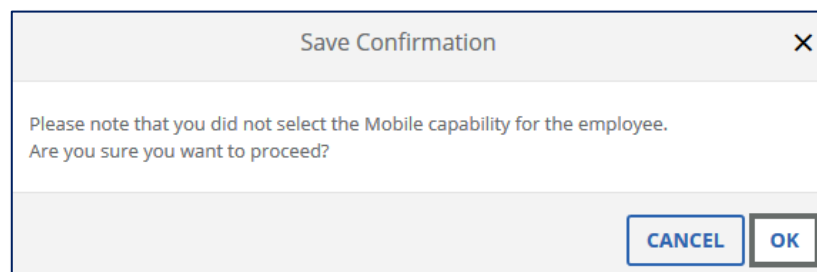
If the **MOBILE USER** checkbox is not selected, the employee cannot use SMC to record call-in/call-out times.

6. Click **SAVE**. The *Save Confirmation* dialog box displays.



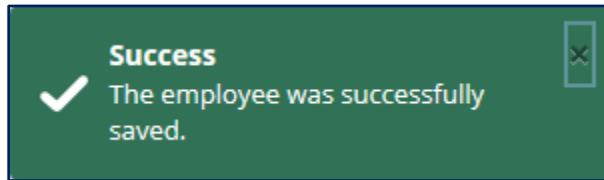
The screenshot shows a 'Save Confirmation' dialog box with a close button (X) in the top right corner. The text inside reads: 'You are going to save changes. Are you sure you want to proceed?'. At the bottom right, there are two buttons: 'CANCEL' and 'OK'. The 'OK' button is highlighted with a red rectangular box.

If the **MOBILE USER** checkbox is not selected, Sandata EVV displays a reminder.



The screenshot shows a 'Save Confirmation' dialog box with a close button (X) in the top right corner. On the left side, there is a blue circular information icon. The text inside reads: 'Please note that you did not select the Mobile capability for the employee. Are you sure you want to proceed?'. At the bottom right, there are two buttons: 'CANCEL' and 'OK'.

7. Click **OK**. The employee is added to the system.



Exercise: Create a New Employee

Modifying Employee Data

Modifying an employee's data allows the updates to any of their information as necessary.

Deleting Employees

Use the **Terminate** option to remove employee data from Sandata EVV going forward. Terminating an employee makes the record inactive. Employees cannot be terminated with a future date. Any activity already captured will continue to reference the employee's previous information. Once an employee is terminated, no activity will be allowed on that employee record, including call-in and call-outs or employee record modifications.

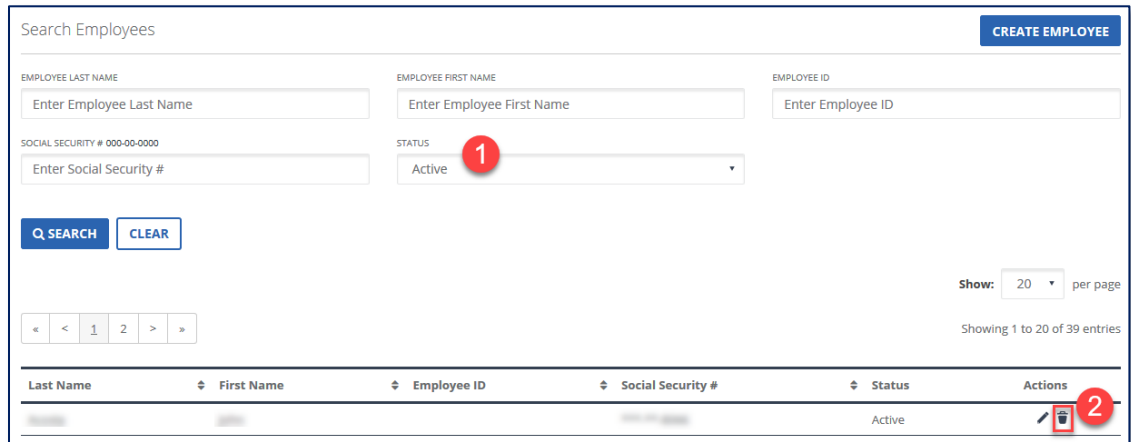


Terminating an employee is not retroactive.

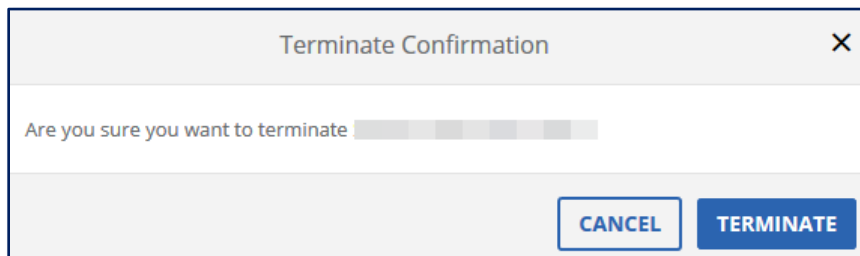


Watch as the instructor demonstrates how to terminate an employee.

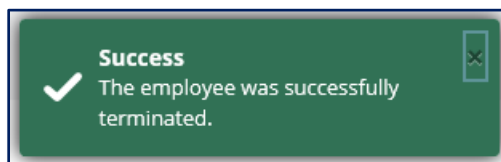
1. Search for an employee.



2. Click **Terminate** (🗑️) to the right of the selected client's name. The *Terminate Confirmation* dialog box displays.



3. Click **TERMINATE**. A successful confirmation dialog box displays.



Reactivating Employees

An employee can also be reactivated. Search for the status of **Inactive** and click **Reactivate** to the right of the selected employee.



Watch as the instructor demonstrates how to reactivate an employee.

1. Search for an employee with the status of **Inactive**.

[CREATE EMPLOYEE](#)

Search Employees

EMPLOYEE LAST NAME

EMPLOYEE FIRST NAME

EMPLOYEE ID

SOCIAL SECURITY # 000-00-0000

STATUS

Inactive 1

[Q SEARCH](#) [CLEAR](#)

Show: per page

Showing 1 to 1 of 1 entries

Last Name	First Name	Employee ID	Social Security #	Status	Actions
Acosta	John		***-**-8066	Inactive	2

2. Click **Reactivate** (🔄) to the right of the selected employee's name. The *Reactivate Employee* confirmation dialog box displays.

×

Reactivate Employee

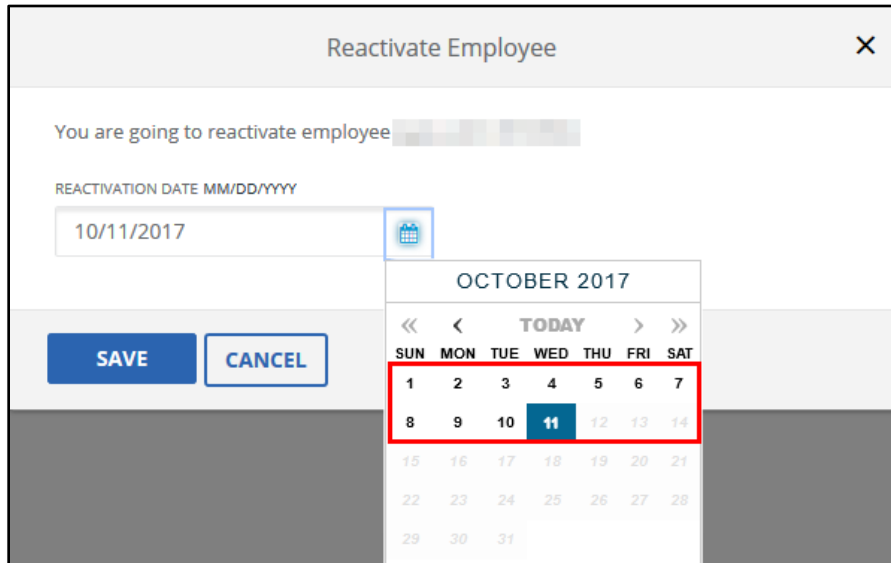
You are going to reactivate employee

REACTIVATION DATE MM/DD/YYYY

[SAVE](#)

[CANCEL](#)

3. Select a **REACTIVATE DATE**. The date defaults to the current day's date. An employee can be reactivated up to the date they were originally terminated.



Reactivate Employee

You are going to reactivate employee [REDACTED]

REACTIVATION DATE MM/DD/YYYY

10/11/2017

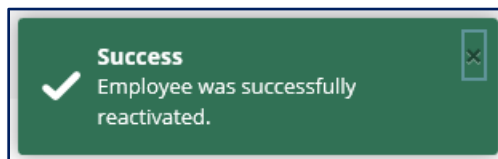
SAVE CANCEL

OCTOBER 2017

« < TODAY > »

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

4. Click **SAVE**. A successful confirmation dialog box displays.



**Exercise: Terminate/Reactivate an employee**

5 eTRAC & EVV Device Management

Module Time

30 minutes

This lesson demonstrates how to request devices for clients and how to request to return devices.

Module Objectives

After completing this lesson, you will be able to:

- register in the eTRAC Portal;
- set up a Security Administrator;
- add additional users;
- use eTRAC functionality such as;
 - request a device for a client in the eTRAC Portal;
 - Request devices from EVV;
 - messaging in eTRAC;
 - describe the process to replace a device; and
 - report end of care of a client.

Introduction

Client registered EVV Devices that are used for the EVV program will be ordered by providers and shipped directly to clients. The client can take the EVV Device with them to locations outside their home, as necessary.

EVV Devices are ordered through the eTRAC Portal. Providers will need to register in the eTRAC Portal to gain access to manage devices. From the eTRAC Portal, providers can:

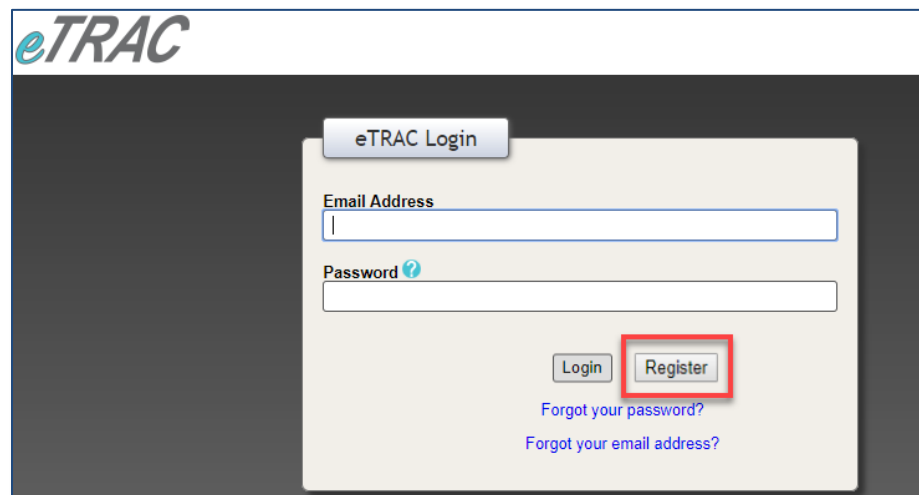
- request a device;
- view which client have had devices ordered for them;
- view tracking information for devices that have already been requested; and
- report end of care of a client.

Registering as a Provider in the eTRAC Portal

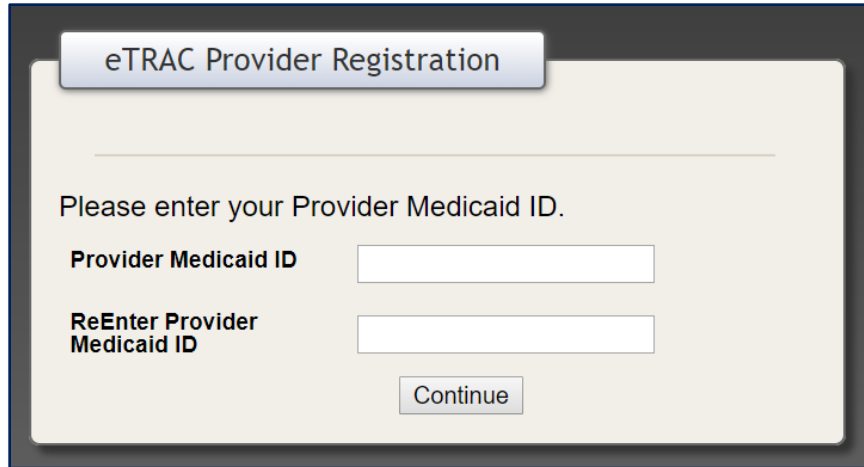
How to Register

Registration in the eTRAC Portal is the first thing necessary to order or manage devices. Use the following URL to access the eTRAC Portal: <https://etraconline.net/login>.

1. Click **Register**, when on the eTRAC website.

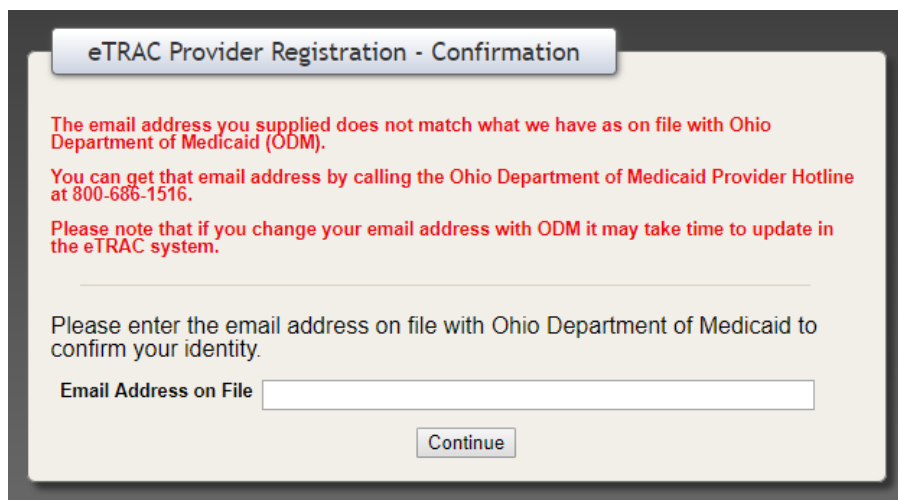


2. Enter the **Provider Medicaid ID**, and then again in the **ReEnter Provider Medicaid ID** field to confirm it and click **Continue**.



The screenshot shows a web form titled "eTRAC Provider Registration". Below the title, it says "Please enter your Provider Medicaid ID." There are two input fields: "Provider Medicaid ID" and "ReEnter Provider Medicaid ID". A "Continue" button is located below the second field.

3. Enter the email address on file with the Ohio Department of Medicaid (ODM), that matches your entered Medicaid Provider ID. If the email address you enter does not match what ODM has on file, you will see the message displayed in **red** in the screenshot below. If you see this, please call ODM at 800-686-1516 to update the email address on file.

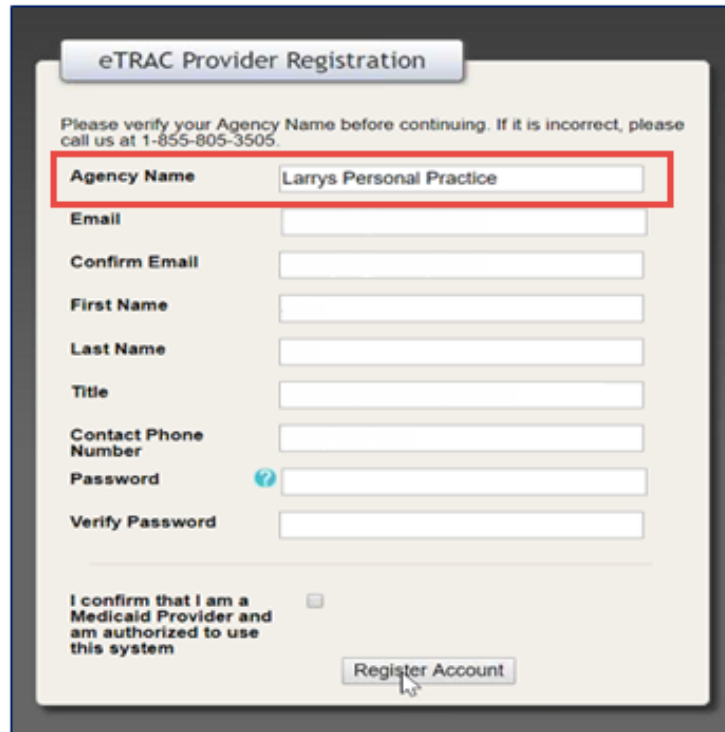


The screenshot shows a web form titled "eTRAC Provider Registration - Confirmation". It contains a red error message: "The email address you supplied does not match what we have as on file with Ohio Department of Medicaid (ODM). You can get that email address by calling the Ohio Department of Medicaid Provider Hotline at 800-686-1516. Please note that if you change your email address with ODM it may take time to update in the eTRAC system." Below the message, it says "Please enter the email address on file with Ohio Department of Medicaid to confirm your identity." There is an input field labeled "Email Address on File" and a "Continue" button below it.



The above screen is only displayed for the initial user logging in to eTRAC. This user becomes the eTRAC Security Administrator. Additional users logging in to eTRAC will only be asked to enter their PIN.

4. If the email address you entered matches what ODM has on file for your Provider ID, you will see a screen with your Agency name or personal name for the email populated on the next screen. You will also see additional fields for you to enter information. Fill out your information and choose a password.



Remember, password requirements are minimum of 12 characters with 1 number, 1 capital letter and 1 lowercase letter.

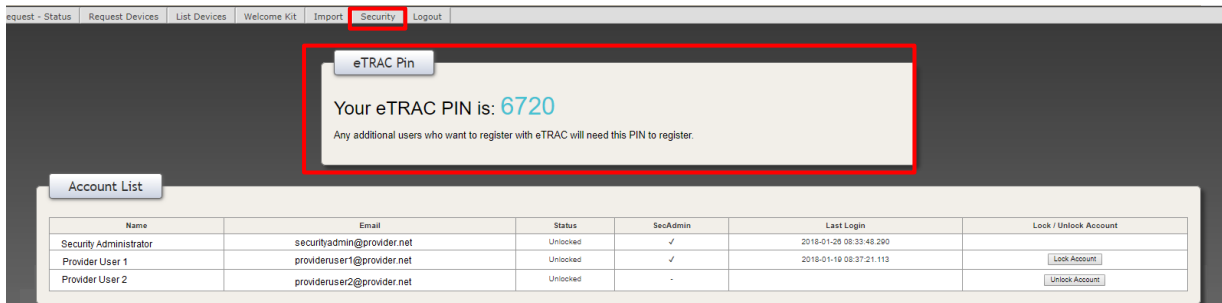


Additional users for the same agency will require a security PIN to register themselves with eTRAC. The security PIN can be obtained from the agency eTRAC administrator. This administrator user has a Security tab at the top of the eTRAC menu bar.

5. Click **“I confirm that I am a Medicaid Provider...system”** checkbox to confirm the user is a Medicaid Provider and authorized to use the system.
6. Click **Register Account**.

Security Administrator

The first person to register for an account for a Provider ID in eTRAC will become that Provider ID's *Security Administrator* in eTRAC. The Security Administrator will see a **Security tab** in eTRAC.



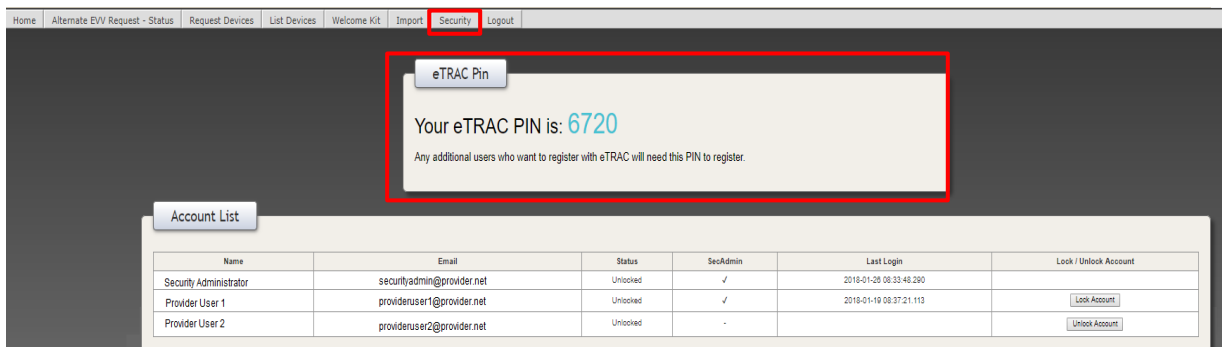
The screenshot shows the 'Security' tab in the eTRAC interface. A red box highlights the 'eTRAC Pin' section, which displays the PIN '6720'. Below this is an 'Account List' table with the following data:

Name	Email	Status	SecAdmin	Last Login	Lock / Unlock Account
Security Administrator	securityadmin@provider.net	Unlocked	✓	2018-01-26 08:33:48.290	
Provider User 1	provideruser1@provider.net	Unlocked	✓	2018-01-19 08:37:21.113	Lock Account
Provider User 2	provideruser2@provider.net	Unlocked	-		Unlock Account

What is a Security Administrator?

A Security Administrator is the person who can now see the **Security tab in eTRAC**. The Security tab contains the randomly-generated 4-digit PIN that has been assigned to your Medicaid Provider ID in eTRAC. It also displays a list of the people who have registered accounts for your Medicaid Provider ID in eTRAC.

This is where the 4-digit PIN that has been set up for your Provider ID in eTRAC will be displayed.



This screenshot is identical to the one above, showing the 'Security' tab with the eTRAC PIN '6720' and the 'Account List' table.



If you are an Agency provider, and you need additional users to register for an eTRAC account, each user will need the 4-digit PIN to complete registration. The Security tab will also display all of the users who have registered in eTRAC under your Provider ID, and it will allow the Security Administrator to unlock any user's account, if it becomes locked.

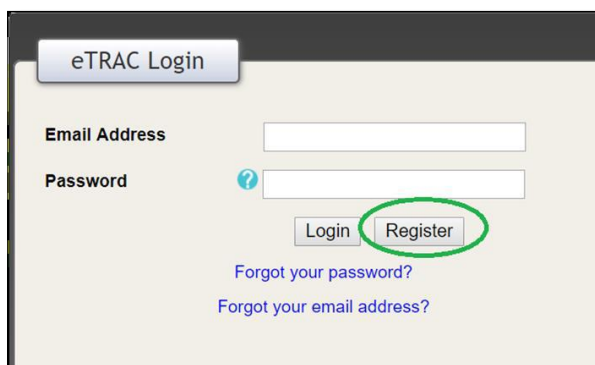
The Security Administrator also has the ability to unlock or lock an account under their Medicaid Provider ID. For example, if an account becomes locked in eTRAC because login attempts are exceeded, the Security Administrator can go to the Security tab and click the “Unlock” option to the right of that person’s email to unlock their account. The Security Administrator will also be the one to provide the 4-digit PIN to any new user who needs to register an account in eTRAC.

If you would like an additional Security Administrator set up for your Medicaid Provider ID in eTRAC, you may contact the EVV Provider Hotline at (855) 805-3505 to have that set up for you. **Only the Security Administrator can provide the 4-digit PIN. For security purposes, not even EVV Provider Support can see your Medicaid Provider ID’s PIN.** EVV Provider Support can assist a Security Administrator in resetting a PIN, if needed.

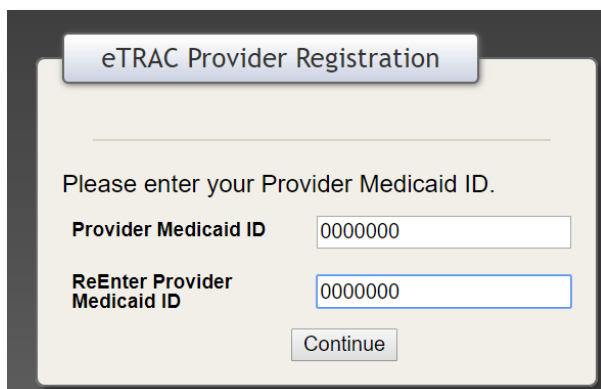
Registering Additional Users in eTRAC

The registration process for a new account, after the Security Administrator account has registered, is as follows:

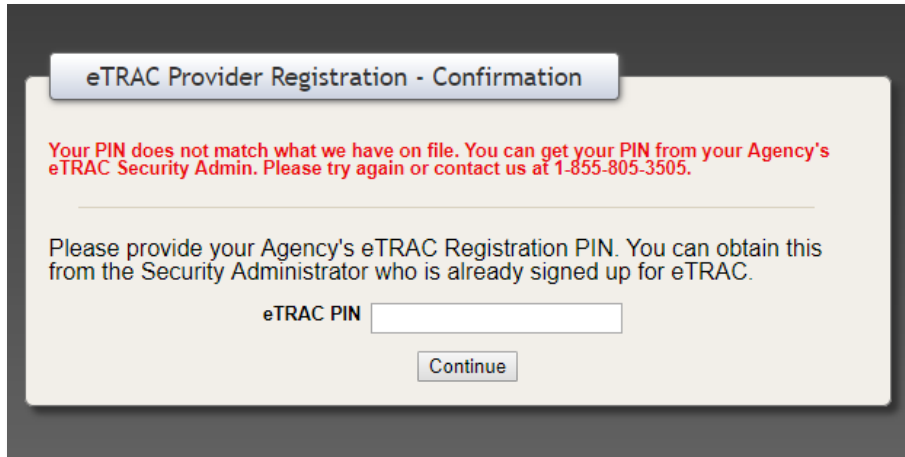
1. Use the following URL to access the eTRAC Portal: <https://etraconline.net/login>. When on the eTRAC website, click **Register**.



2. Enter the **Provider Medicaid ID**, and then **re-enter** it again to ensure it is correct. Click **Continue**.



3. Enter the 4-digit PIN. Your Security Administrator would provide the PIN to enter:



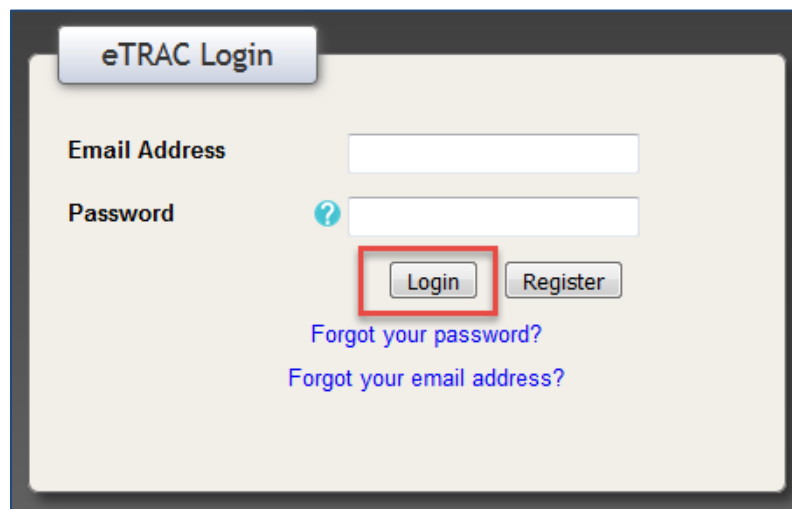
The screenshot shows a web form titled "eTRAC Provider Registration - Confirmation". At the top, a red error message reads: "Your PIN does not match what we have on file. You can get your PIN from your Agency's eTRAC Security Admin. Please try again or contact us at 1-855-805-3505." Below this, a text prompt says: "Please provide your Agency's eTRAC Registration PIN. You can obtain this from the Security Administrator who is already signed up for eTRAC." There is a text input field labeled "eTRAC PIN" and a "Continue" button below it.

Remember, if you do not know the identity of your Security Administrator, you may call the EVV Provider Hotline at (855) 805-3505. EVV Provider Support can help you identify your Security Administrator, but they cannot see the 4-digit PIN. For security, only your Security Administrator(s) can see the PIN.

If you have any questions on this process or need additional assistance, please reach out to the EVV Provider Hotline at (855) 805-3505.

Using the eTRAC Portal

After successfully registering in the eTRAC Portal, click **Login** to use the portal to manage devices.



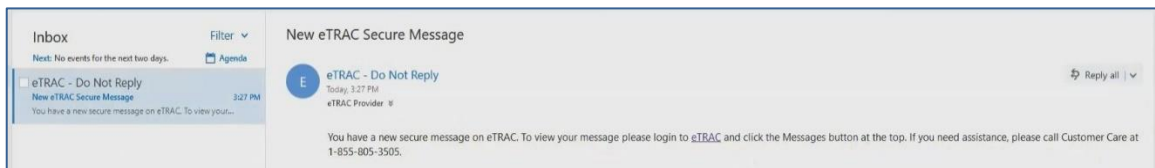
The screenshot shows the "eTRAC Login" screen. It features two input fields: "Email Address" and "Password". The "Password" field has a question mark icon to its left. Below the input fields are two buttons: "Login" and "Register". The "Login" button is highlighted with a red rectangular box. Below the buttons are two links: "Forgot your password?" and "Forgot your email address?".

Messaging in the eTRAC Portal

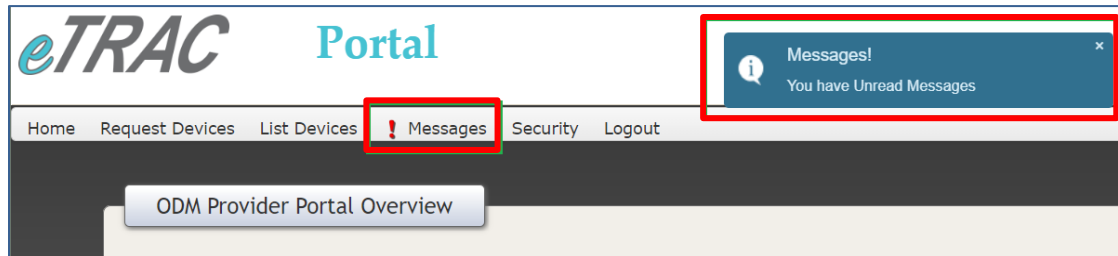
Due to security, support staff at the EVV Provider Hotline cannot communicate with providers through email. All written communication between the EVV Provider Hotline and providers will be handled through the Messaging feature in eTRAC.

Here’s how it works:

1. If you send an email message to the EVV Provider Hotline’s inbox (evvproviderhelpdesk@etraonline.net), the support team will receive the message.
2. A support agent at the Hotline will respond to the email by sending you a message in eTRAC.
3. When you have a new message in eTRAC from the EVV Provider Hotline, you will receive an automated email notification that there is a new message to read in eTRAC, like this:



4. You can then log into eTRAC to see your message. Locate the **Messages** tab to read and respond to messages from the EVV Provider Hotline. When you have a new message, there will be a pop-up message on every tab that you select in eTRAC, letting you know that you have a message. You will also see an exclamation mark on the Messages tab.

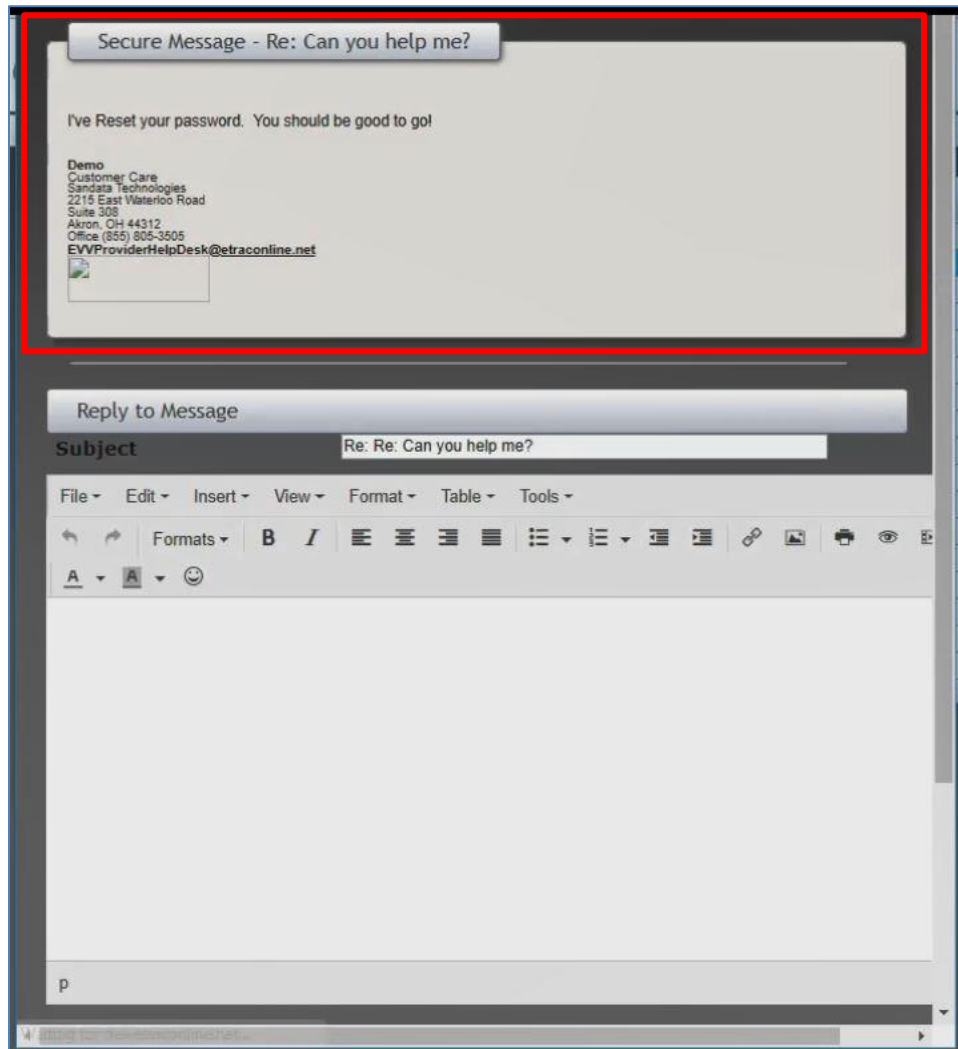


5. Click on the **Messages** tab to view your messages. New messages will be in **bolded text**.

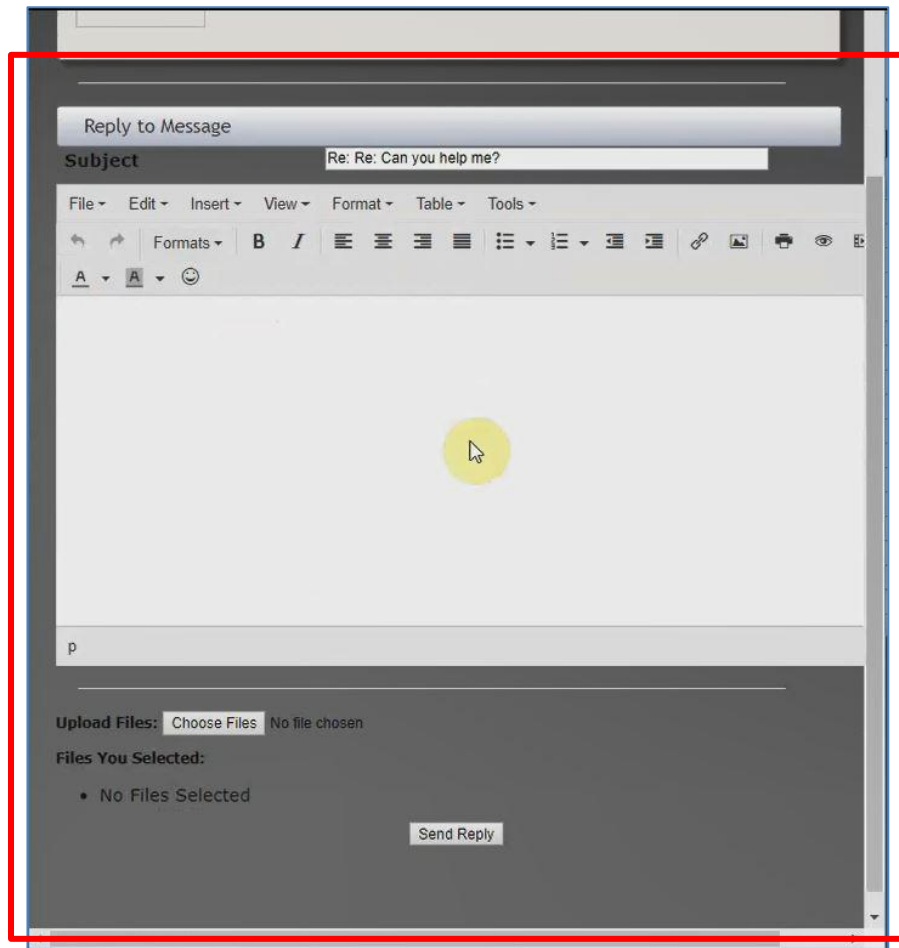


Date / Time	Sender	Subject
2018-07-03 11:26:56	Justin Vertha	Re: Can you help me?
2018-07-03 10:44:07	Justin Vertha	Re: Reset
2018-07-03 10:21:58	Justin Vertha	Re: 100 message
2018-07-02 11:37:08	Justin Vertha	SECURE: meeting
2018-07-02 11:31:58	Justin Vertha	Re: Re: Ticket Message
2018-07-02 11:19:21	Justin Vertha	Ticket Message

6. **Click on a message** to view it. The message will pop up on the screen, with the message from the support agent appearing at the top of the box.



7. To reply to the message, **scroll down in the message box, type your message** in the blank space, and then click **Send Reply**. You can also use the Choose Files button to securely upload files, even those that contain PHI, because the message will only be sent and received through the secure eTRAC portal.



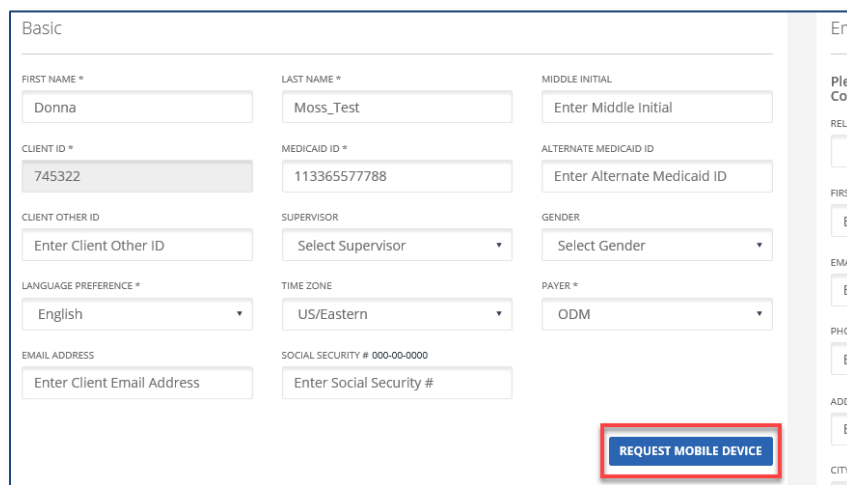
Requesting Devices

Devices can be requested for a client in EVV where the client is created or requested in eTRAC. In EVV, the request button appears in the *Basic* section of the client record. In eTRAC, the screen to enter the individual information/address is the *Request Devices* screen. If a device request is made in EVV, all information flows through and appears in the List Devices screen. Note, the provider must already be in eTRAC in order for this process to function.

Requesting a Device in EVV

An EVV Device can also be requested from the client record in Sandata EVV simply by clicking the **REQUEST MOBILE DEVICE** button on the client record screen.

1. Search for and locate the client record.
2. Click the Edit icon to open the client record.
3. Click the **REQUEST MOBILE DEVICE** button.

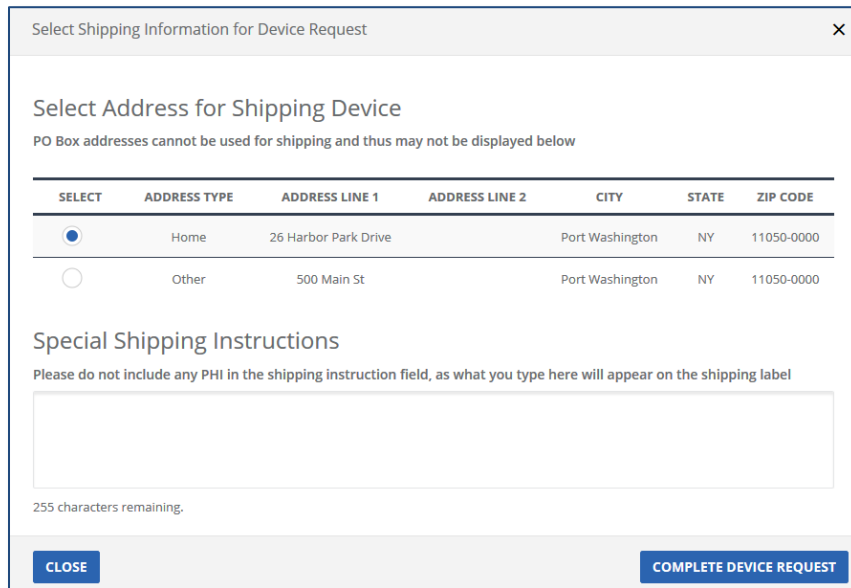


The screenshot shows a 'Basic' client record form with the following fields:

- FIRST NAME *: Donna
- LAST NAME *: Moss_Test
- MIDDLE INITIAL: Enter Middle Initial
- CLIENT ID *: 745322
- MEDICAID ID *: 11336557788
- ALTERNATE MEDICAID ID: Enter Alternate Medicaid ID
- CLIENT OTHER ID: Enter Client Other ID
- SUPERVISOR: Select Supervisor
- GENDER: Select Gender
- LANGUAGE PREFERENCE *: English
- TIME ZONE: US/Eastern
- PAYER *: ODM
- EMAIL ADDRESS: Enter Client Email Address
- SOCIAL SECURITY # 000-00-0000: Enter Social Security #

A red box highlights the **REQUEST MOBILE DEVICE** button located at the bottom right of the form.

4. Select or confirm the Shipping address (If the client has multiple addresses, the primary address is selected by default). Enter special shipping instructions into the text box if needed (e.g. please go to side door).



Select Shipping Information for Device Request

Select Address for Shipping Device

PO Box addresses cannot be used for shipping and thus may not be displayed below

SELECT	ADDRESS TYPE	ADDRESS LINE 1	ADDRESS LINE 2	CITY	STATE	ZIP CODE
<input checked="" type="radio"/>	Home	26 Harbor Park Drive		Port Washington	NY	11050-0000
<input type="radio"/>	Other	500 Main St		Port Washington	NY	11050-0000

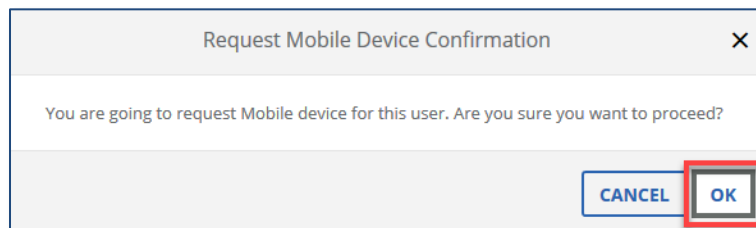
Special Shipping Instructions

Please do not include any PHI in the shipping instruction field, as what you type here will appear on the shipping label

255 characters remaining.

CLOSE **COMPLETE DEVICE REQUEST**

5. Click **COMPLETE DEVICE REQUEST**.
6. A request confirmation screen appears. Click **OK** to complete the order.

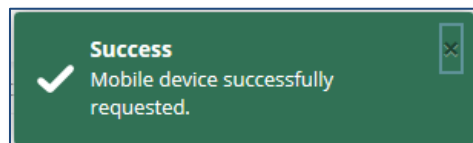


Request Mobile Device Confirmation

You are going to request Mobile device for this user. Are you sure you want to proceed?

CANCEL **OK**

7. A success message appears at the top of the screen.



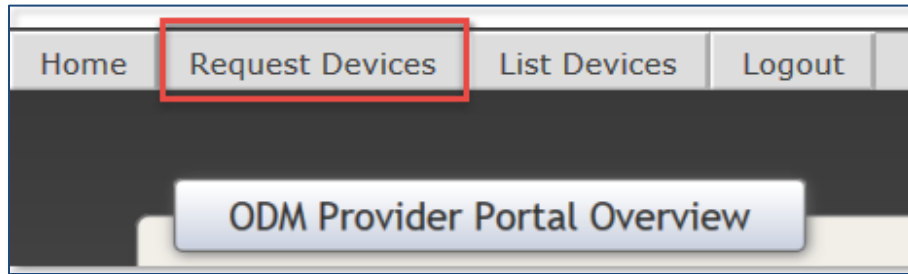
Success
 ✓ Mobile device successfully requested.

Requesting a Device in eTRAC

1. When logged into the eTRAC Portal, a list of options displays across the top of the screen. Click **Request Devices**. The *Request EVV Device* screen displays.



An EVV Device can also be ordered from the the Client record within Sandata EVV.



2. Complete the fields with information regarding the client for whom the EVV Device is being ordered.



The screenshot shows a form titled 'Request MVV Device'. At the top, there is a red warning message: 'Please do NOT include any PHI in the Special Shipping Instructions as what you type there is printed on the FedEx label.' Below this, the form contains several input fields: 'Ind. Medicaid ID', 'First Name', 'Last Name', 'Address 1', 'Address 2', 'City', 'State' (with 'OH' selected), 'Zip Code', and 'Special Shipping Instructions' (with a help icon). A 'Request Device' button is located at the bottom of the form.

- **Ind. Medicaid ID:** This is the client’s 12-digit Medicaid ID.
- **Address:** This is the address of the client and where they will be receiving the device.
- **Special Shipping Instructions:** Additional information can be added that will help ensure delivery of the device, such as where to leave the package outside a client’s home. Example: “Please go to the side door, next to the garage and allow extra time for the client to answer the door”.



Neither Personal Health Information (PHI) nor Personal Identifiable Information (PII) is to be entered in the **Special Shipping Instructions** field.

3. Click **Request Device**, when finished filling out the fields. The *Request EVV Device* screen displays again with all entry fields blank.



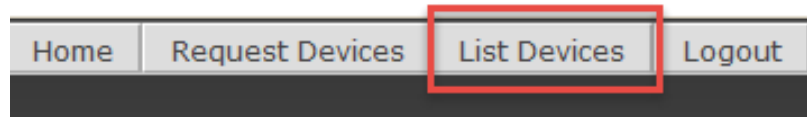
If the EVV Device request is successful, a confirmation displays in blue text with the client's name and a logistics ticket number.



The logistics ticket number is used to locate the request on the *List Devices* tab or when calling EVV Provider Hotline.

Viewing Device Information

Click **List Devices** to display a list of EVV Devices that have already been requested for your agency's client(s).



Another provider may have already requested a device for a client. Your agency must still request a device for this client. The *List Devices* screen displays the tracking status based on the original device request for this client.

The *List Devices* screen displays:

My Agency's Devices - 99						
Request Number	First Name	Last Name	Medicaid ID	Status	Action	
L20171103.4	fred	barney	311032017	Processing		
L20171101.1	Sonya	Blade	121212561212	In Home	View Tracking	Return Device
L20171128.52	Jane	Brown	114111282017	Processing		
L20171104.1	bob	buil	132646564935	Processing		
L20171118.3	Bob	Builder	223311665533	Processing		
L20171118.1	Casey	Davis	452855426851	Processing		
L20170904.1	ODM	Demo Unit	946554651154	In Home	View Tracking	Return Device
L20170906.1	Jim	Doe	123486364564	Processing		
L20171031.2	john	doe	94010312017	Processing		

- Request Number:** This is the logistics ticket number that is displayed in blue upon successful completion of the device request.
- First Name and Last Name:** This is the first and last name of the client for whom the device was requested.
- Medicaid ID:** This displays the Medicaid ID that has been entered for the client.
- Status:** This column indicates whether the EVV Device is Processing, In Transit, or In Home. When the EVV Device reaches the 'In-Transit' status, tracking information for the EVV Device is visible by clicking **View Tracking**.

Returning a Device

An EVV Device is to be returned using the eTRAC Portal only if:

- the client is no longer receiving care from the agency provider; or
- the client has expired.

Email Confirmations



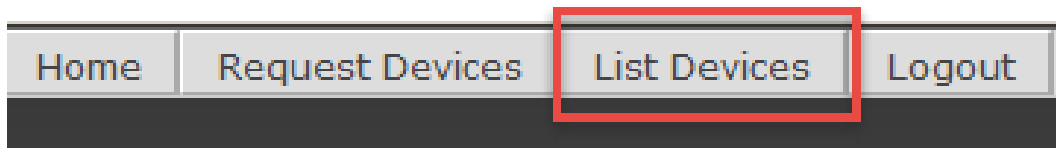
- Upon return request for reasons other than expired:
 - Email confirmations are sent to all other providers associated with the client
- Five business days to respond
 - Indicate you are still providing care to the client by clicking the link included in the email
 - If no response is received, a return kit is sent to the client



To return an EVV Device for any reason other than the two listed above, please contact the EVV Provider Hotline.

To return an EVV Device:

1. Click **List Devices**.



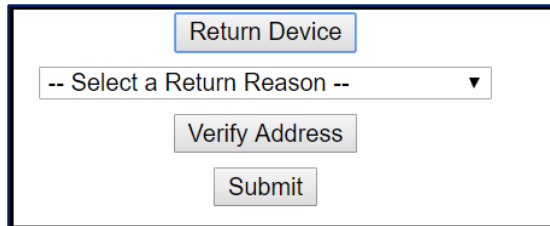
2. From the list, locate the client for whom the EVV Device return is necessary. Click **Return Device**, listed under the **Action** column on the right-hand side of the screen.

My Agency's Devices - 99					
Request Number	First Name	Last Name	Medicaid ID	Status	Action
L20171103.4	fred	barney	112311032017	Processing	
L20171101.1	Sonya	Blade	121212561212	In Home View Tracking	Return Device
L20171128.52	Jane	Brown	114111282017	Processing	
L20171104.1	bob	build	132646564935	Processing	
L20171118.3	Bob	Bulder	223311665533	Processing	
L20171118.1	Casey	Davis	452855426851	Processing	



Although the button is named **Return Device**, the provider is actually reporting a reason that the EVV Device is no longer being used to record visits to a client.

1. Select a **Return Reason** why the device is no longer to be used to record visits.

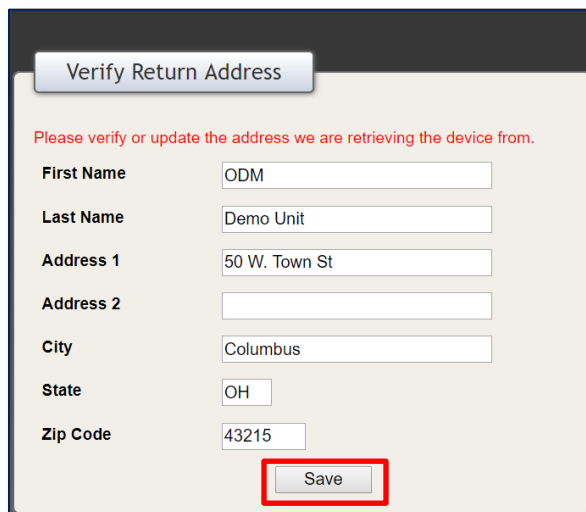


The screenshot shows a form with a blue button labeled "Return Device" at the top. Below it is a dropdown menu with the text "-- Select a Return Reason --" and a downward arrow. Underneath the dropdown are two buttons: "Verify Address" and "Submit".



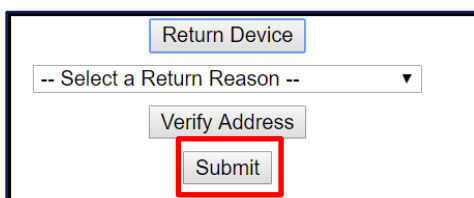
The list is an example of possible reasons and not necessarily all-inclusive. The EVV Device can be returned for any reason. If the EVV Device is being returned for a reason other than what's listed, please call the EVV Provider Hotline.

2. Click **Verify Address**. The *Verify Return Address* pop-up screen displays.



The screenshot shows a pop-up window titled "Verify Return Address". At the top, there is a red message: "Please verify or update the address we are retrieving the device from." Below this message are several input fields: "First Name" (ODM), "Last Name" (Demo Unit), "Address 1" (50 W. Town St), "Address 2" (empty), "City" (Columbus), "State" (OH), and "Zip Code" (43215). At the bottom right of the form is a "Save" button, which is highlighted with a red rectangle.

3. Click **Save** to close the *Verify Return Address* pop-up screen.
4. Click **Submit**.



This screenshot is identical to the one above, but the "Submit" button at the bottom is highlighted with a red rectangle.

6 EVV-SMC/TVV

Module Time

60 minutes

This lesson introduces the mobile visit verification call-in/call-out process and the telephony call process which employees utilize for every visit.

Module Objectives

After completing this lesson, you will be able to:

- explain the purpose and basic functionality of SMC;
- access and log on to SMC;
- identify the SMC window elements and explain how to navigate within SMC;
- describe the back-up call process utilizing the client's telephone or any phone associated with the client; and
- explain the different Call Reference Guides (CRG) available for use.

Introduction

Sandata Mobile Connect (SMC) is the mobile visit verification app installed on a provided EVV Device or downloadable by the employee onto their own smartphone or tablet device. SMC allows an employee to start and complete a visit, capturing the necessary visit information.

For the Ohio EVV Program, SMC is the primary and preferred method of clocking in and out for client visits.



An employee can start a visit using SMC and complete the visit using Telephony and vice versa, if necessary.



SMC does not use the camera during operation. It uses the microphone only at the point of client voice verification, and captures GPS location only at the point of starting a visit and completing a visit.

Set Up and Credentialing

SMC user credentials for employees are generated when the employee is created as an employee in Sandata EVV.

When an agency provider creates an employee, the following information must be specified in the employee profile in order for Sandata EVV to create SMC login credentials.

- First and Last name
- Valid email address
- Social Security Number
- Check the **MOBILE USER** checkbox in the *Employment* section

When these values are captured and the employee record is saved, Sandata EVV generates a temporary SMC password and emails it to the employee at the email address entered.



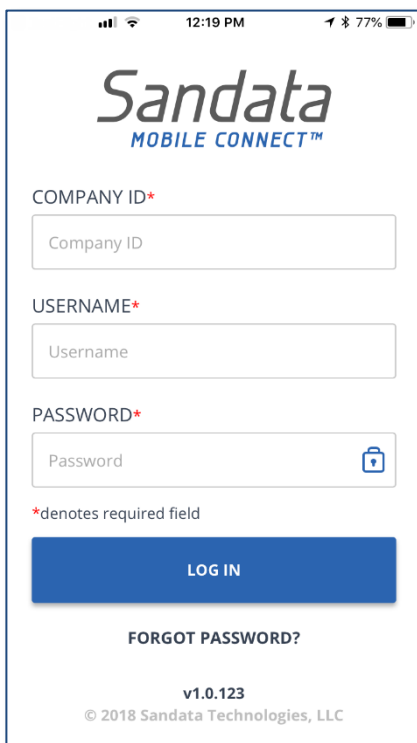
The temporary password is valid for 60 days. If the temporary password expires, the EVV security administrator can reset the mobile password.

Initial Set-up



When the employee taps on the SMC icon and logs in for the first time, he or she will need to enter the following data elements:

- **Company ID:** 2-Sandata account # (always the number 2 plus a dash and the agency provider's assigned Sandata account #. Example: 2-20101).
- **Username:** employee's email address.
- **Password:** the temporary password emailed to the employee's email address entered when creating the employee.



The screenshot shows the Sandata Mobile Connect login interface. At the top, the Sandata logo and 'MOBILE CONNECT™' are displayed. Below the logo are three input fields: 'COMPANY ID*' with a placeholder 'Company ID', 'USERNAME*' with a placeholder 'Username', and 'PASSWORD*' with a placeholder 'Password' and a lock icon. A note below the fields states '*denotes required field'. A blue 'LOG IN' button is positioned below the fields. At the bottom, there is a 'FORGOT PASSWORD?' link, the version number 'v1.0.123', and the copyright notice '© 2018 Sandata Technologies, LLC'.

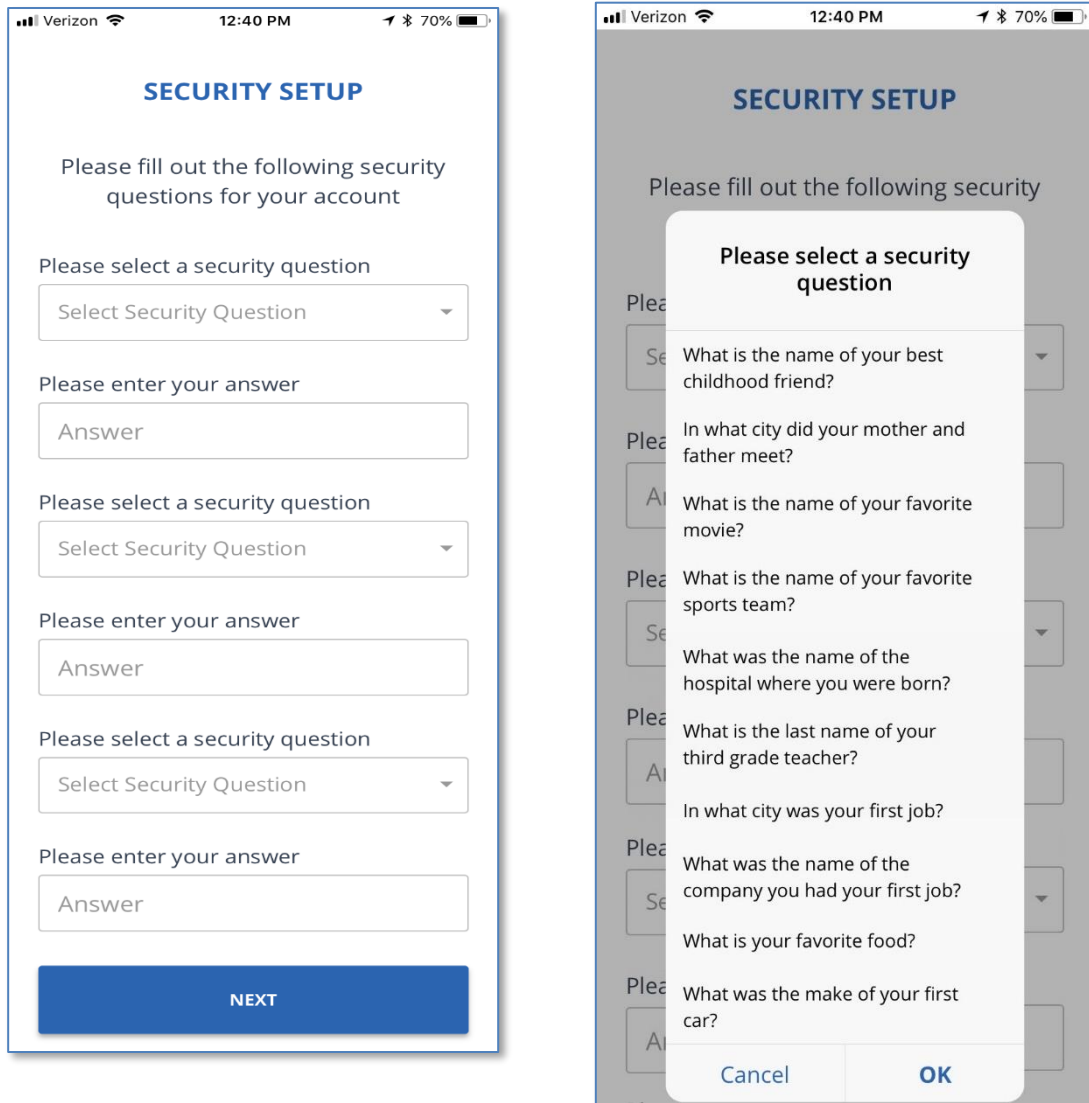


Tapping the lock icon in the **PASSWORD** field displays the password. Displaying the password can help with log-in and password entry.



Tap the **FORGOT PASSWORD?** link to reset a locked password or reset a forgotten password.

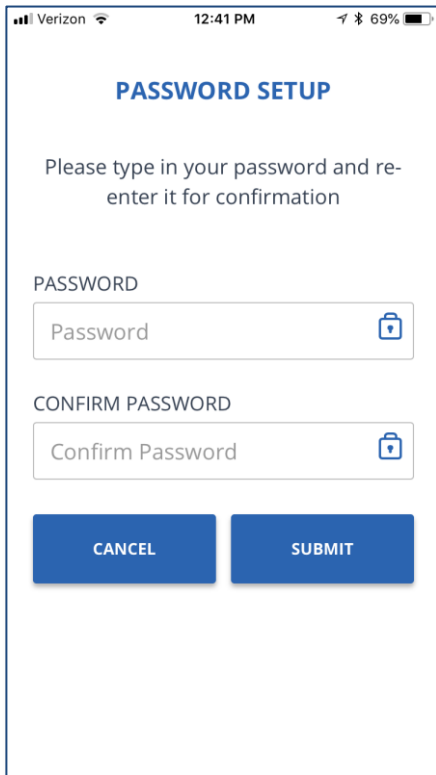
Upon logging in to SMC for the first time, the employee is asked to select and define answers to a set of security questions.



After answering three (3) of the ten (10) security questions, the next screen prompts the employee to create a new password.



To verify the reset of a forgotten or locked password later, SMC prompts the employee to answer the selected security questions.



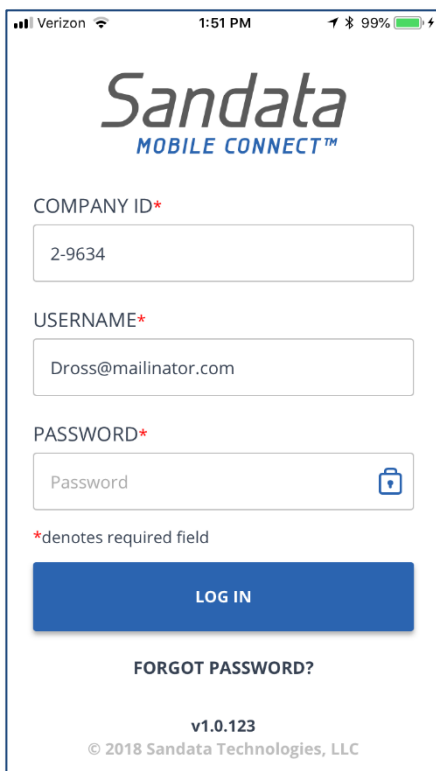
The screenshot shows a mobile application interface for password setup. At the top, the status bar shows 'Verizon', signal strength, time '12:41 PM', and battery '69%'. The title is 'PASSWORD SETUP'. Below the title, it says 'Please type in your password and re-enter it for confirmation'. There are two input fields: 'PASSWORD' and 'CONFIRM PASSWORD', both with a lock icon on the right. At the bottom, there are two buttons: 'CANCEL' and 'SUBMIT'.

1. Enter the **New Password**.



Passwords are **case sensitive**. They must be at least eight characters long, have at least one upper case, one lower case letter, one numeric character and one “special” character (@#\$%^).

2. **Confirm Password**.
3. Click **CONTINUE** after entering the new password.



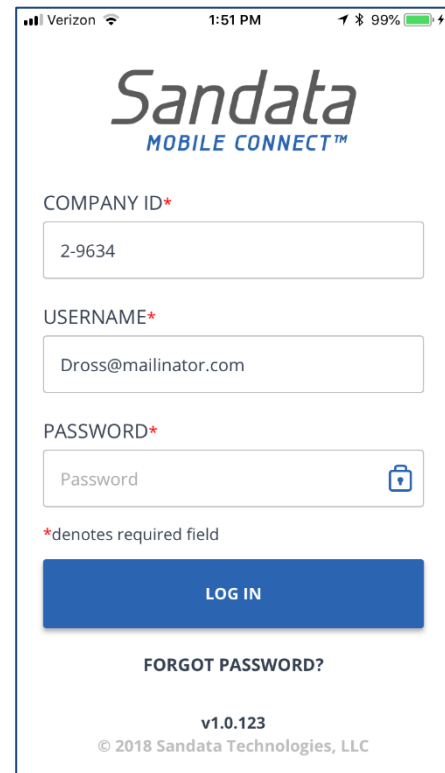
The screenshot shows a mobile application interface for login. At the top, the status bar shows 'Verizon', signal strength, time '1:51 PM', and battery '99%'. The title is 'Sandata MOBILE CONNECT™'. Below the title, there are three input fields: 'COMPANY ID*' with the value '2-9634', 'USERNAME*' with the value 'Dross@mailinator.com', and 'PASSWORD*' with a lock icon on the right. Below the fields, it says '*denotes required field'. At the bottom, there is a 'LOG IN' button, a 'FORGOT PASSWORD?' link, and the version 'v1.0.123' and copyright '© 2018 Sandata Technologies, LLC'.

The Login screen displays. The employee uses the new password at the next login.

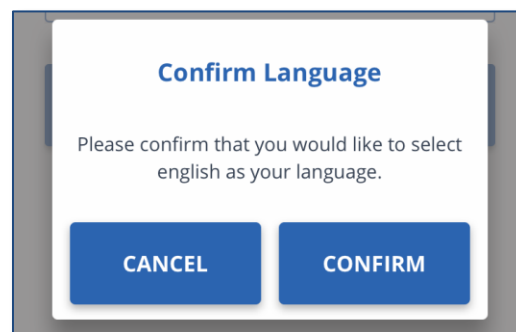
After successfully logging in with the new password, the next screen prompts the employee to confirm the language preference from a drop-down list on the screen.

Languages available for the program include:

- English
- Egyptian Arabic
- French
- Fulah
- Hindi
- Mandarin Chinese
- Nepali
- Russian
- Serbian
- Somali
- Spanish
- Swahili
- Vietnamese



The image shows a mobile application login screen for Sandata Mobile Connect. At the top, the Sandata logo and 'MOBILE CONNECT™' are displayed. Below the logo, there are three input fields: 'COMPANY ID*' with the value '2-9634', 'USERNAME*' with the value 'Dross@mailinator.com', and 'PASSWORD*' with the placeholder 'Password'. A small lock icon is next to the password field. Below the fields, a note states '*denotes required field'. A large blue 'LOG IN' button is centered below the fields. Underneath the button is a link for 'FORGOT PASSWORD?'. At the bottom, the version 'v1.0.123' and copyright '© 2018 Sandata Technologies, LLC' are shown. The status bar at the top indicates Verizon service, 1:51 PM, and 99% battery.



The image shows a 'Confirm Language' dialog box. The title is 'Confirm Language'. The text inside reads: 'Please confirm that you would like to select english as your language.' At the bottom, there are two blue buttons: 'CANCEL' on the left and 'CONFIRM' on the right.

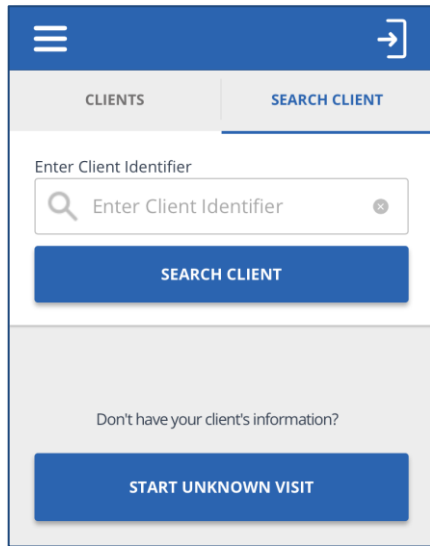
After confirming the language preference on the device, the *Home* screen displays.



The preferred language must be selected the first time the employee logs in to SMC from a new device.


Navigating the Home screen

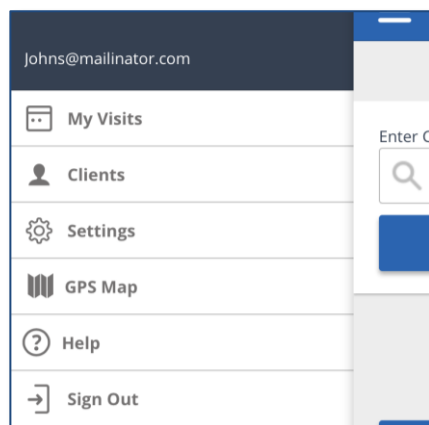
Upon successfully logging in to SMC, the user is presented with the *Home* screen. From this screen, the user is able to:



- **Search for a client to start a visit** – tap into the **Enter Client Identifier** field and enter the 12-digit Medicaid ID or EVV system generated Client ID to search for the client.
- **Start an unknown visit** – tap the **START UNKNOWN VISIT** to enter the client’s name and Medicaid ID in order to start the visit.

The user can also tap the menu icon in the upper-left corner of the screen to access:

- **My Visits** – to see completed past visits.
- **Clients** – to perform a client search.
- **Settings** – to change language preference and password. All other options on the settings screen are disabled.
- **GPS Map** – displays SMC user’s current location.
- **Help** – to open the SMC help guide.
- **Sign Out** – to exit SMC. (The user can also tap the **Sign Out** icon  in the upper-right corner of the screen to log out of SMC).



Starting a Visit

When the employee arrives to provide care to the client, he or she will:

1. Locate the EVV Device or their personal device.
2. Log in to SMC.
3. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID or EVV system generated Client ID of the client.

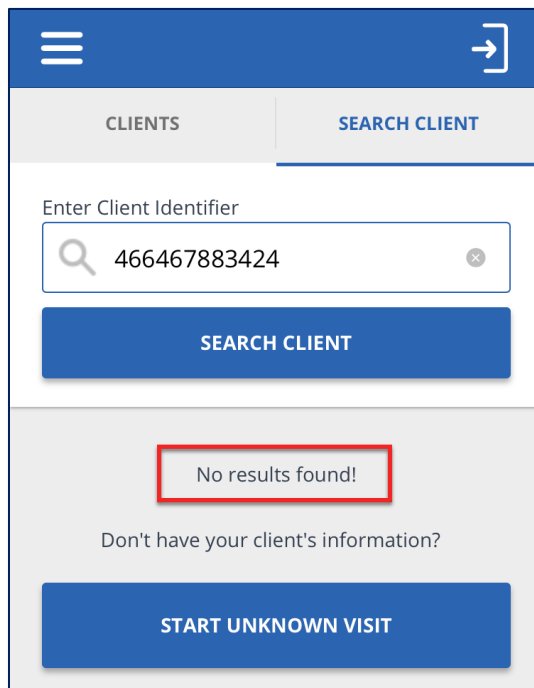
Starting an Unknown Visit



If the Medicaid ID entered is not found, the employee can still call-in and out by starting an unknown visit.

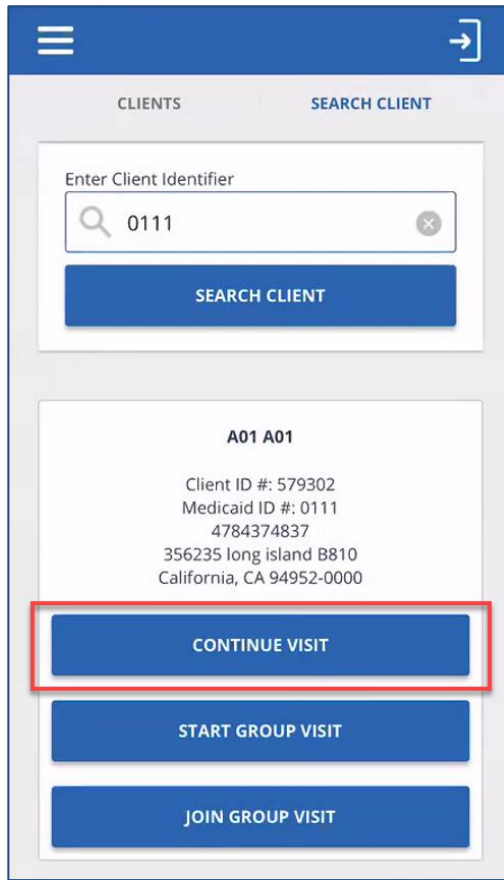
This will be covered after the known client call-in/call-out process.

4. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any client, a “No results found” message displays).

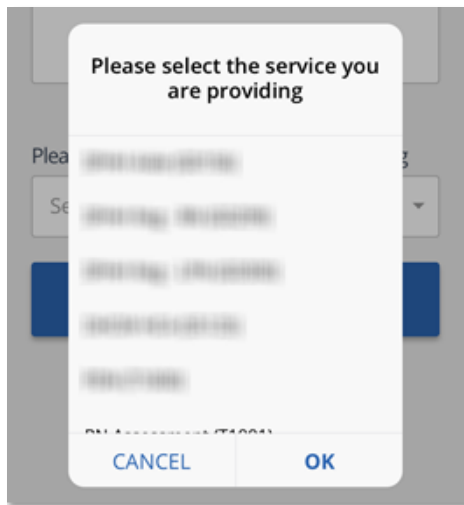


The screenshot shows a mobile application interface with a blue header containing a menu icon and a back arrow. Below the header are two tabs: 'CLIENTS' and 'SEARCH CLIENT'. The 'SEARCH CLIENT' tab is active. Underneath, there is a text input field labeled 'Enter Client Identifier' containing the number '466467883424'. A blue 'SEARCH CLIENT' button is positioned below the input field. Below the search results area, a red rectangular box highlights the text 'No results found!'. Underneath this message, there is a link that says 'Don't have your client's information?' and a blue 'START UNKNOWN VISIT' button.

5. Tap the **CONTINUE VISIT** button when the search results display.

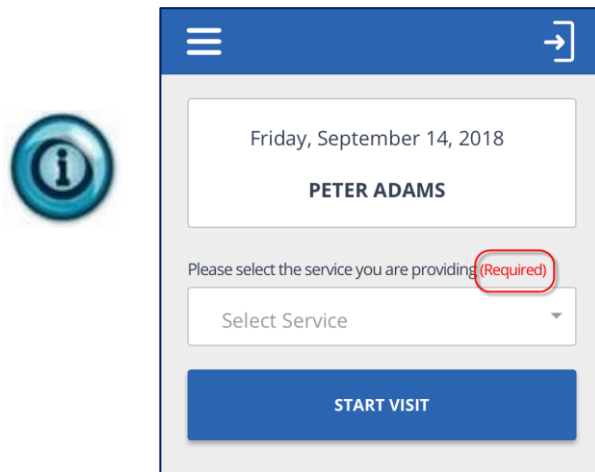


6. Select the *Service* from the drop-down list. (The list is based on the current services from the Payer section of the client record in Sandata EVV.)

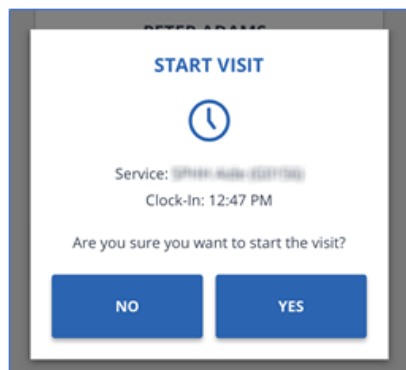


Service Selection Note

A service must be selected in order to start a visit. If a service is not chosen and the employee taps the **START VISIT** button, the screen displays “Required” above the Select Service field.



-
7. Tap the **START VISIT** button. A pop-up screen appears asking the employee to confirm the start of the visit.



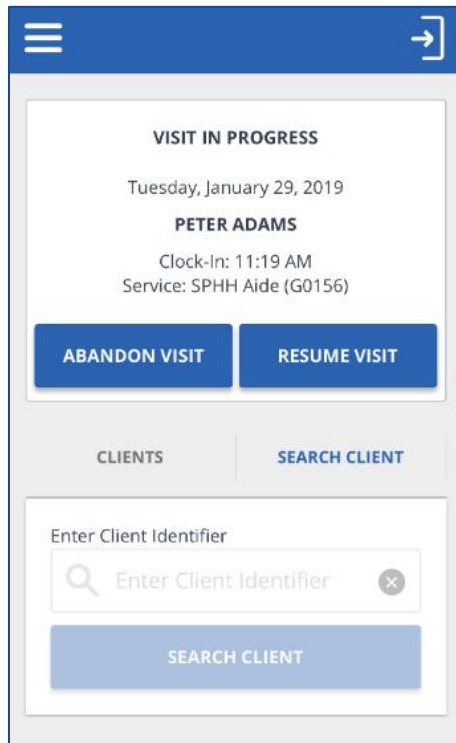
8. Log out of the SMC and proceed with providing care.



To ensure security, after five (5) minutes of inactivity, a pop-up appears allowing the user to extend the session. If there is no activity during the two (2) minute extension period, the employee is automatically logged out of SMC.

Completing a Visit

1. Log in to SMC. The *Home* screen shows the visit is in progress. Tap **RESUME VISIT**.

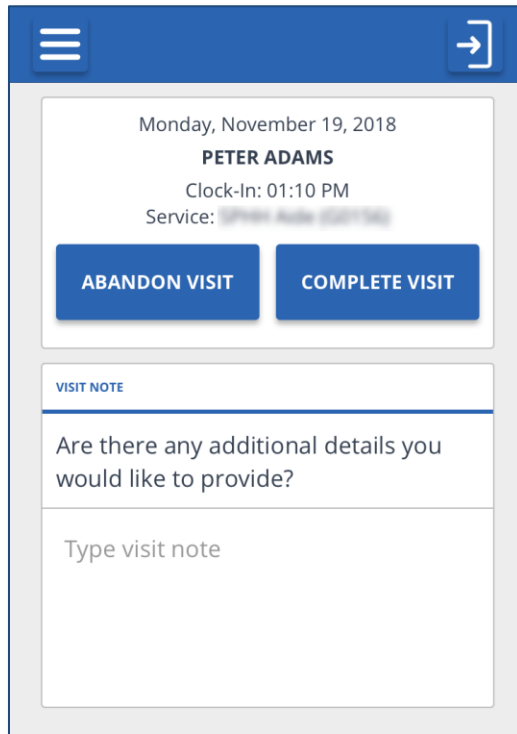


ABANDON VISIT button



The **ABANDON VISIT** button allows the in-progress visit to be stopped so that a new visit can be started. This is used in cases when the visit was completed but the employee forgot to call-out. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

2. The *Visit Note* screen displays. Enter notes if applicable.

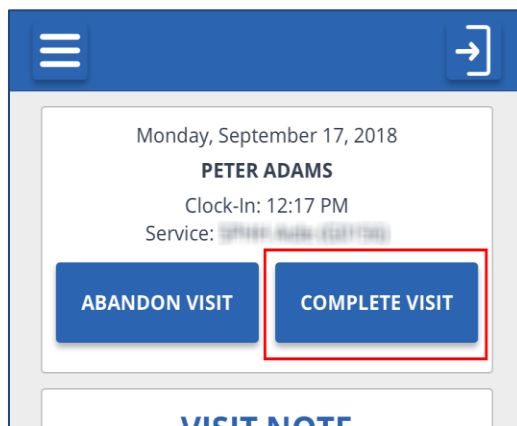


The screenshot shows a mobile application interface for a visit note. At the top, there is a blue header with a menu icon on the left and a back arrow on the right. Below the header, the date "Monday, November 19, 2018" is displayed. The name "PETER ADAMS" is shown in bold. Below the name, the text "Clock-In: 01:10 PM" and "Service: [REDACTED]" are visible. There are two blue buttons: "ABANDON VISIT" and "COMPLETE VISIT". Below these buttons is a section titled "VISIT NOTE" with a question: "Are there any additional details you would like to provide?". Underneath the question is a text input field with the placeholder text "Type visit note".



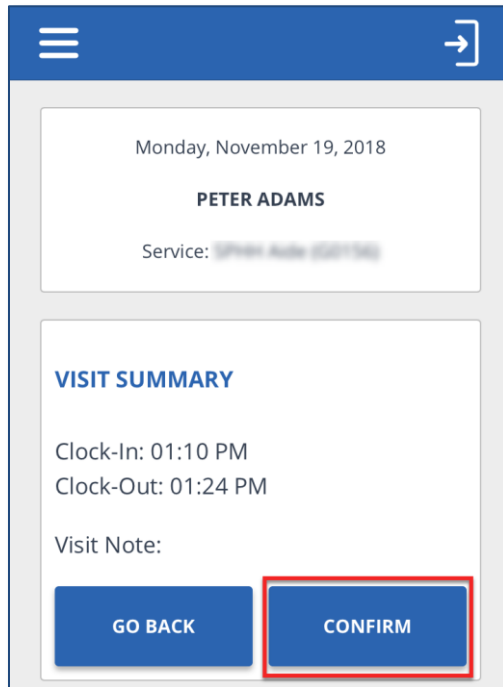
Please be aware that notes will never be required. This **Visit Note** field should **not** be used to capture clinical data, PHI or satisfy ODM documentation requirements. This **Visit Note** field should **not** be used to capture any clinical data.

3. Tap **COMPLETE VISIT**.

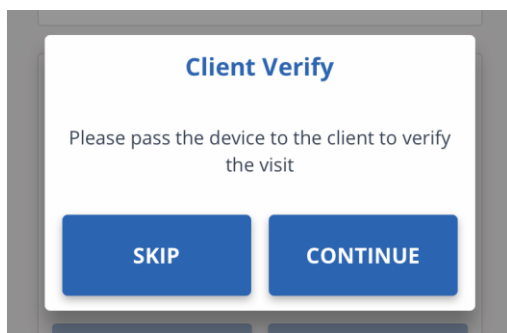


This screenshot is identical to the previous one, but with a red rectangular box highlighting the "COMPLETE VISIT" button. The date is now "Monday, September 17, 2018" and the clock-in time is "12:17 PM".

4. The *Visit Summary* screen displays. Tap **CONFIRM**.



5. The *Client Verify* screen displays. Tap **CONTINUE** and pass the device to the client or tap **SKIP**.



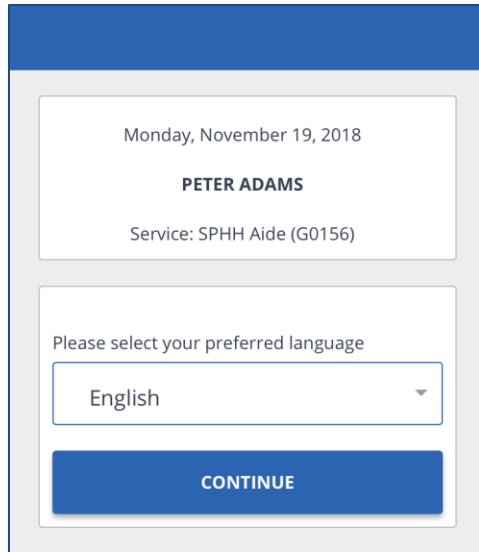
The **SKIP** button allows the in-progress visit to be completed when the client is not willing or able to verify the visit. This visit appears in Sandata EVV as an exception and must be verified in *Visit Maintenance*.

The following steps are completed by the client.



For DODD clients, there is no client confirmation. Therefore, it is not necessary to pass the EVV Device or personal device for the client to complete the visit.

6. Tap on a language in the drop-down field then tap **CONTINUE**.



Monday, November 19, 2018

PETER ADAMS

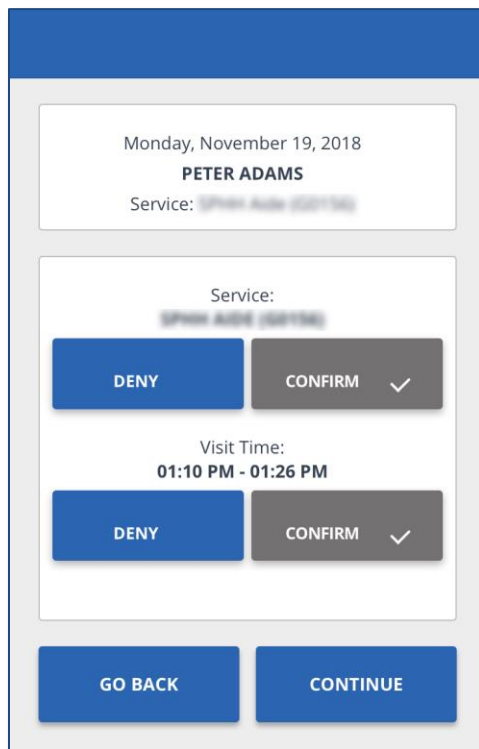
Service: SPHH Aide (G0156)

Please select your preferred language

English

CONTINUE

7. The *Client Confirmation* screen displays. The client must tap **CONFIRM** or **DENY** for the *Service* and *Visit Time*, then tap **CONTINUE**.



Monday, November 19, 2018

PETER ADAMS

Service: SPHH Aide (G0156)

Service:
SPHH AIDE (G0156)

DENY **CONFIRM** ✓

Visit Time:
01:10 PM - 01:26 PM

DENY **CONFIRM** ✓

GO BACK **CONTINUE**

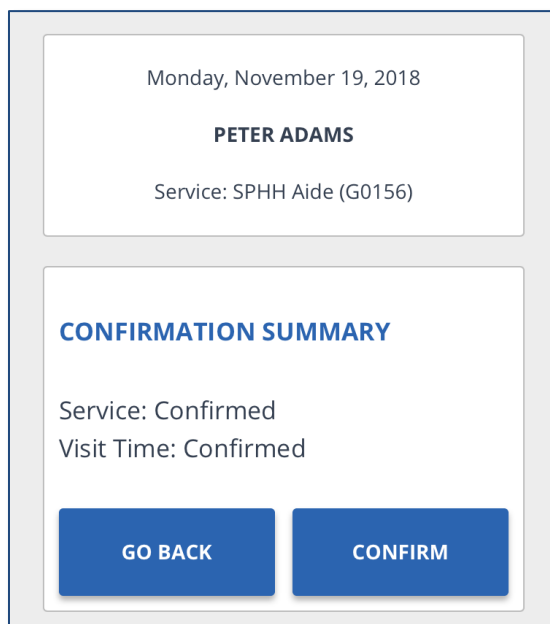


Client Confirmation

The client cannot bypass the confirmation screen; they must choose **CONFIRM** or **DENY** for each item before the **CONTINUE** button is enabled.

If the client taps **DENY** for either item on the visit, a *Visit Verification* exception is created for the visit in Sandata EVV *Visit Maintenance*.

8. The *Confirmation Summary* screen displays. Tap **CONFIRM** (Tapping **GO BACK** returns the user to the previous screen).



Monday, November 19, 2018

PETER ADAMS

Service: SPHH Aide (G0156)

CONFIRMATION SUMMARY

Service: Confirmed
Visit Time: Confirmed

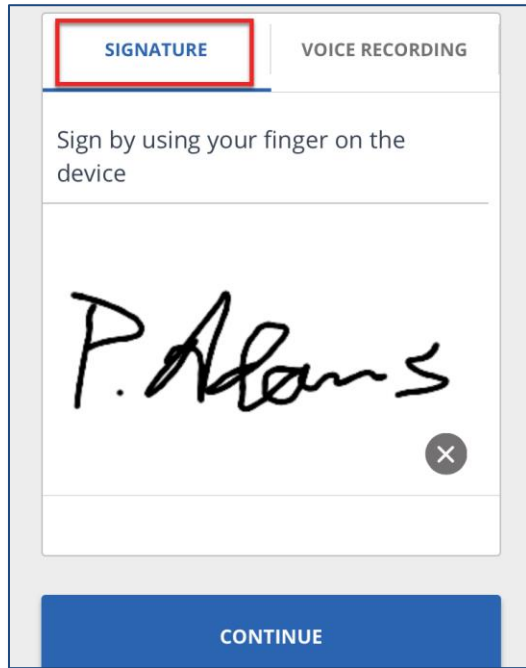
GO BACK **CONFIRM**

9. The *SIGNATURE/VOICE RECORDING* screen displays.

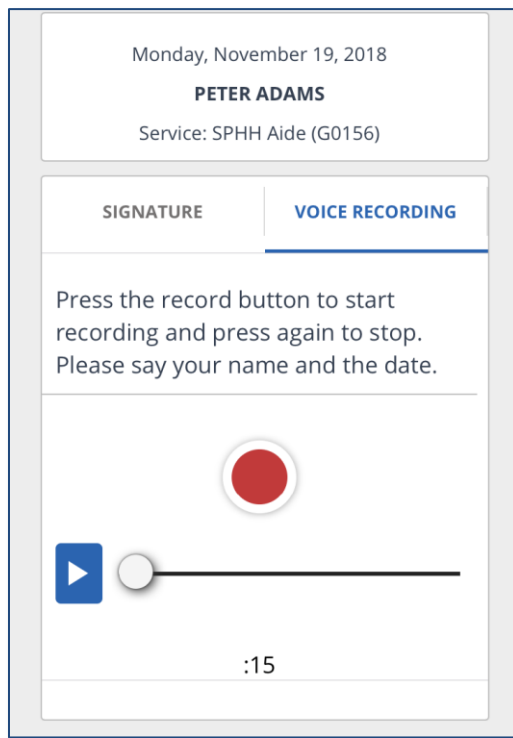


The preferred method of confirmation is to use voice recording.

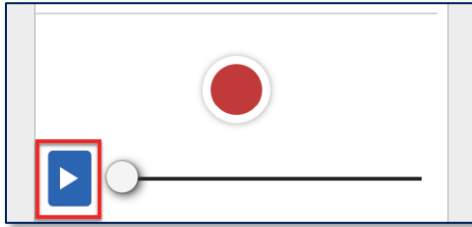
- **SIGNATURE:** Sign in the box



- **VOICE RECORDING:** Tap the circle to record your name and the current date. Tap the circle again to end the recording.



- To review the recording, simply tap the **Play** icon.



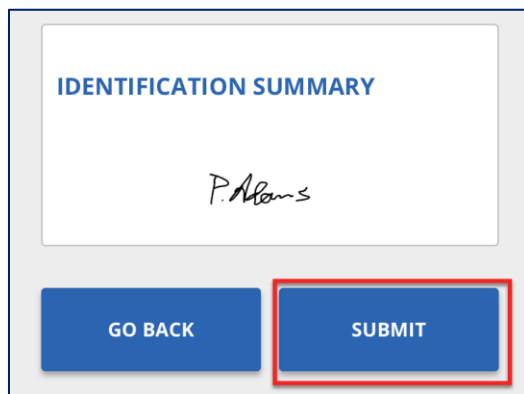
10. After signing or recording the voice, tap **CONTINUE**.



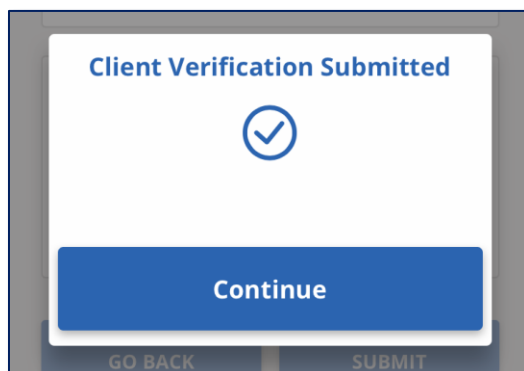
If both voice recording and signature exists, SMC prompts the user to choose which confirmation to associate to the visit.

Remember, voice recording is the preferred method of confirmation.

11. The Identification Summary screen displays. Tap **SUBMIT**.



12. Tap **CONTINUE**. The visit is successfully submitted and the *Login* screen displays.

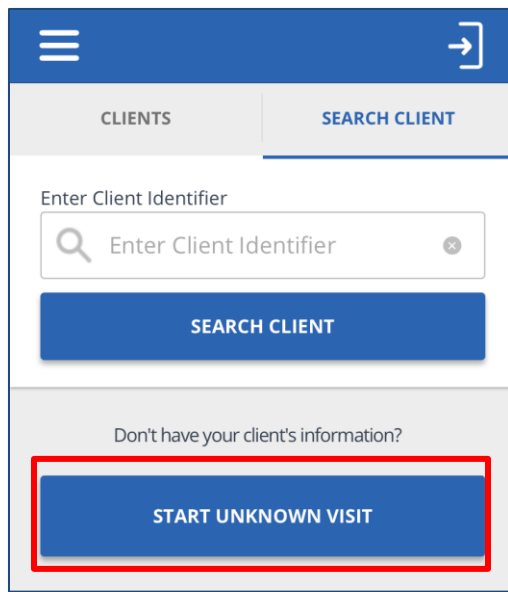


Starting an Unknown Visit

If the Medicaid ID or Client ID entered is not found when trying to start a visit, the employee can start an unknown visit. Unknown visits appear in Sandata EVV as an *Unknown Client Visit* exception and must be fixed in *Visit Maintenance*.

When the employee is unable to select the client by entering the Medicaid ID or Client ID, he or she will:

1. Locate the EVV Device or the employee's personal device.
2. Log in to SMC.
3. Tap **START UNKNOWN VISIT**.



4. Enter the following information for the client (this information is available on the *Memo* screen of the *Visit Details* in the *Visit Maintenance* module).
 - **FIRST NAME** (Required)
 - **LAST NAME** (Required)
 - **Medicaid ID #** (Optional – if available)

START UNKNOWN VISIT

Please enter the client's name before continuing

FIRST NAME *

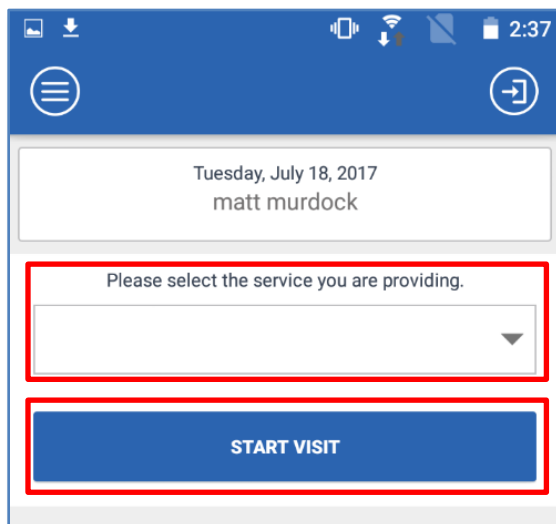
LAST NAME *

MEDICAID ID #

*denotes required field

CANCEL **CONTINUE**

5. Tap **CONTINUE**.
6. Select the *Service* from the drop-down list

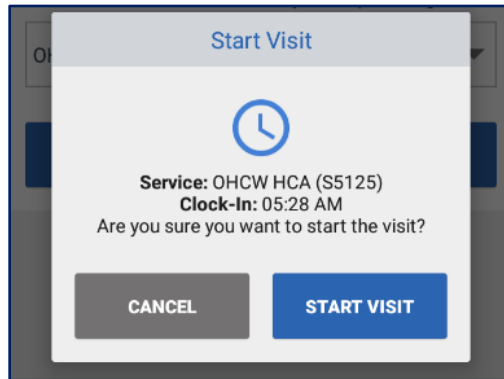


Tuesday, July 18, 2017
matt murdock

Please select the service you are providing.

START VISIT

7. Tap **START VISIT**. A pop-up displays asking the employee to confirm the start of visit.



8. Tap **START VISIT**. The visit is completed following the same process used when completing a visit for a known client.
9. Log out of the SMC.

TVV

TVV is available as an alternative to the mobile call-in/call-out process. TVV should be utilized in cases where SMC is not available (e.g., the device has not been charged, connectivity issues, because the device has not yet been delivered, etc.).




An employee can start a visit using TVV and complete the visit using SMC and vice versa, if required.


When using TVV, employees can call-in/call-out from any phone (i.e. client’s home phone, cell phone or employee’s cell phone).

Service ID List

This tables lists the 3-digit Service IDs which needs to be entered during the TVV call-out process.

			
<u>English Service List</u>			
Agency Name / STX ID Number			
Toll Free Numbers			
Service ID	Description	Service ID	Description
101	SPHH Aide (G0156)	656	MyCare - LPN (T1003)
202	SPHH Nsg - RN (G0299)	707	OHCW HCA (S5125)
303	SPHH Nsg - LPN (G0300)	717	Passport HCA (S5125)
404	PDN (T1000)	757	MyCare - HCA (S5125)
505	OHCW Nsg - RN (T1002)	777	Passport HCA Personal Care (S5125)
515	Passport - NSG - RN (T1002)	808	OHCW PCA (T1019)
535	IO NSG - RN (T1002)	818	Passport - PCA (T1019)
555	MyCare - RN (T1002)	838	IO HPC (DD25x, MR81x, MR94x)
606	OHCW Nsg - LPN (T1003)	858	L1 HPC (DD25x, DD26x, MR82x, MR970, MR980)
616	Passport - LPN (T1003)	878	MyCare - PCA (T1019)
636	IO NSG - LPN (T1003)	909	RN Assessment (T1001)

English Call Reference Guide SAMPLE



santrax
ELECTRONIC VISIT VERIFICATION™














Call Reference Guide:
«COMPANY_NAME»

Agency Account Number: STX«ACCOUNT»

Write your Santrax ID number above for easy reference.

Dial:
1-«Primary_Phone»
Or
1-«Secondary_Phone»

Features:
 STX ID Verification / Playback Group Visit – No
 CIOP Select Service
 Client Voice Recording Client Verification: Visit
 Client Verification: Service


Calling Instructions	STX«ACCOUNT»
<p>Calling In: When arriving at the client's home, make sure you have the following information:</p> <ul style="list-style-type: none"> • Your Santrax ID. • Your Client's ID. 	
<p>1.  Dial any of the toll-free numbers assigned to your agency. <i>If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.</i></p>	
<p> Santrax will say: "Welcome, please enter your Santrax ID."</p>	
<p>2.  Press the numbers of your Santrax ID on the touch tone phone.</p>	
<p> Santrax will say: "You entered (SANTRAX ID). Press (1) for Yes, (2) for No."</p>	
<p>3.  Press (1) to confirm your Santrax ID or press (2) to retry.</p>	
<p> Santrax will say: "Is this a group visit? Press (1) for Yes or (2) for No."</p>	
<p>4.  Press (2) for not a group visit.</p>	
<p> Santrax will say: "Please select (1) to call in or (2) to call out."</p>	
<p>6.  Press the (1) key to "Call In".</p>	
<p> Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."</p>	
<p>7.  Press the numbers of the client's ID.</p>	
<p> Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."</p>	
<p>8.  Hang up.</p>	


Calling Instructions STX«ACCOUNT»


Calling Out: When leaving the client's home, make sure you have the following information:


- Your Santrax ID.
- The Service ID.
- The Client is available to verify the visit.


9. Follow steps 1 thru 4 to and then continue.


 Santrax will say: "Please select (1) to call in or (2) to call out."


10.  Press the (2) key to "Call Out."


 Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."


11.  Press the numbers of the client's ID.



 Santrax will say: "Please enter the Service ID."


12.  Press the Service ID Number you performed.
Refer to your agency's service list.


 Santrax will say: "You entered (SERVICE). Please press (1) to accept, (2) to retry."

13.  Press the one (1) key to accept, or press the two (2) key to retry.


 Santrax will say: "To record the client's voice please press (1) and hand the phone to the client, or press (2) if the client is unable to participate."


14.  Press '1' to record the client's voice.
OR
 Press '2' if the client is unable to participate.
If the client is unable to participate, Santrax will say, "Thank you, bye."


15.  Hand the phone to the client and the client will be asked to state their name and today's date.


 Santrax will say: "Please say your first and last name and today's date."


Calling Instructions STX«ACCOUNT»


16.  The client should say their first and last name and today's date.


 Santrax will say: "In call received at (TIME). Out call received at (TIME). Total visit length (NUMBER) minutes. Press (1) to confirm, (2) to deny, (3) to replay."

17.  The client should press the appropriate option.

 Santrax will say: "The service performed was (SERVICE). Press (1) to confirm, (2) to deny, (3) to replay."



18.  The client should press the appropriate option.

 Santrax will say: "Thank you, bye."


19.  Hang up.

What to do if there is a Problem:

These are some possible problems you may experience when using the telephone.

-  Busy Signal
-  No Answer

- Check the number to make sure you have the right phone number.
- Try calling again.
- Try calling the second toll-free number provided.
- If you still cannot complete the call, contact your supervisor or CDS Employer, as applicable.

-  If the system says: "Sorry, Invalid Number"

See if the phone has a T-P (Tone-to-pulse) switch; make sure the switch is on T. If there is no switch, you must say your ID number one digit at a time, into the phone after the tone.



Santrax TVV prompts callers up to three times to input information.

If a caller receives a busy signal, try the alternate number.

Two or more calls made within one minute of another will make one of the calls extraneous.

Individual Visit Call Process - English Line

Call-In	
1	Dial either English toll-free number.
	Santrax will say: <i>"Welcome, please enter your Santrax ID."</i>
2	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	Santrax will say: <i>"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."</i> If the Santrax ID entered does not match to an employee record, Santrax will say: <i>"You have entered an invalid Santrax ID, please try again."</i>
3	Press 1 for Yes.
	Santrax will say: <i>"Is this a Group Visit, press 1 for Yes or 2 for No."</i>
4	Press 2 for No.
	Santrax will say: <i>"Press 1 to call-in or 2 to call-out."</i>
5	Press the 1 to call-in.
	Santrax will say: <i>"Received at [Time]."</i> After a brief pause, Santrax will say: <i>"Please enter first client ID or hang up if done."</i> If the phone number the call is coming from is only associated to more than one (1) client, enter the system generated client ID found in the client record in Sandata EVV.
6	Hang up if no client ID is needed <u>or</u> all client IDs have been entered.

Santrax IDs and Client IDs



- The Santrax ID is a unique system-generated number identifier for the employee and is used by the employee to identify themselves on a TVV call.
- The Client ID is a unique system-generated number identifier for the client, used by the employee on a TVV call to identify the client.

Call-Out	
1	Dial either English toll-free number.
	Santrax will say: <i>“Welcome, please enter your Santrax ID.”</i>
2	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	Santrax will say: <i>“You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No.”</i> If the Santrax ID entered does not match to an employee record, Santrax will say: <i>“You have entered an invalid Santrax ID, please try again.”</i>
3	Press 1 for Yes.
	Santrax will say: <i>“Is this a Group Visit, press 1 for Yes or 2 for No.”</i>
4	Press 2 for No.
	Santrax will say: <i>“Please select 1 to call-in or 2 to call-out.”</i>
5	Press the 2 to call-out.
	Santrax will say: <i>“Received at [Time].”</i> After a brief pause, Santrax will say: <i>“Please enter first client ID or hang up if done.”</i>
6	Enter the Client ID number.
	Santrax will say: <i>“Please enter the Service ID.”</i>
7	Press the three-digit ID of the care performed.
	Santrax will say: <i>“You entered [Service description]. Please press 1 to accept, 2 to retry.”</i>
8	Press the 1 to accept.



For each prompt, Santrax allows a caller three attempts to enter the information correctly. After three unsuccessful attempts, the call is terminated. If the call is terminated, the caregiver should call and inform the agency. The agency will fix the call in Visit Maintenance.

After the service, Santrax will say: *“To record the client’s voice please press 1 and hand the phone to the client or press 2 if the client is unable to participate.”*

- 1) Press (1) to record client’s voice (hand phone to client):
 - a) Santrax will say: *“Please say your first and last name and today’s date.”*
 - b) The client will say their name and the date.
 - c) Santrax will say: *“In call received at [Time]. Out call received at [Time]. Total visit length [number] minutes. Press 1 to confirm, 2 to deny, 3 to replay.”*
 - d) Client will press appropriate choice.
 - e) Santrax will say: *“The service performed was [service description]. Press 1 to confirm, 2 to deny, 3 to replay.”*
 - f) Client will press appropriate choice.
 - g) Santrax will say: *“Thank you, bye.”*
 - h) Hang up.


- 2) Press (2) if the client is unable to participate.
 - a) Santrax will say: *“Thank you, bye.”*
 - b) Hang up.



For DODD clients, when Santrax prompts: *“To record the client’s voice please press 1 and hand the phone to the client or press 2 if the client is unable to participate.”*

Simply hang up to end the call since the functionality does not apply to DODD clients.

Multi-language Call Reference Guide SAMPLE



Call Reference Guide:
«COMPANY_NAME»

Agency Account Number: STX«ACCOUNT»

Write your Santrax ID number above for easy reference.

Dial:
1-«Primary_Phone»
Or
1-«Secondary_Phone»

Features:

Select Language	STX ID Verification / Playback
Group Visit - No	CIOP
Select Service	Client Voice Recording
Client Verification: Visit	Client Verification: Service


STX«ACCOUNT»


Calling Instructions


Calling Out: When leaving the client's home, make sure you have the following information:


- Your Santrax ID.
- The Service ID.
- The Client is available to verify the visit.


9. Follow steps 1 thru 6 to and then continue.


 Santrax will say: "Please select (1) to call in or (2) to call out."


10.  Press the (2) key to "Call Out."


 Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."


11.  Press the numbers of the client's ID.



 Santrax will say: "Please enter the Service ID."


12.  Press the Service ID Number you performed.
Refer to your agency's service list.


 Santrax will say: "You entered (SERVICE). Please press (1) to accept, (2) to retry."









13.  Press the one (1) key to accept, or press the two (2) key to retry.











 Santrax will say: "To record the client's voice please press (1) and hand the phone to the client, or press (2) if the client is unable to participate."

14.  Press '1' to record the client's voice.
 OR
 Press '2' if the client is unable to participate.
If the client is unable to participate, Santrax will say, "Thank you, bye."

15.  Hand the phone to the client and the client will be asked to state their name and today's date.

 Santrax will say: "Please say your first and last name and today's date."

Calling Instructions	STX«ACCOUNT»
<p>Calling In: When arriving at the client's home, make sure you have the following information:</p> <ul style="list-style-type: none"> • Your Santrax ID. • Your Client's ID. 	
<p>1.  Dial any of the toll-free numbers assigned to your agency. <i>If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.</i></p> <p style="padding-left: 20px;">The Santrax system will say: "For English, please press one (1). For Egyptian Arabic, please press two (2). For French, please press three (3). For Fulah, please press four (4). For Hindi, please press five (5). For Mandarin Chinese, please press six (6). For Nepali; please press seven (7). For Russian, please press eight (8). For Serbian, please press nine (9). For Somali, please press ten (10). For Spanish, please press eleven (11), For Swahili, please press twelve (12), For Vietnamese, please press thirteen (13)." <i>Call prompts are heard in the selected languages.</i></p>	
<p>2.  Press the number that corresponds to the language you wish to hear. <i>All prompts for the remainder of the call will be heard in that language.</i></p> <p style="padding-left: 20px;">Santrax will say: "Welcome, please enter your Santrax ID."</p>	
<p>3.  Press the numbers of your Santrax ID on the touch tone phone.</p> <p style="padding-left: 20px;">Santrax will say: "You entered (SANTRAX ID). Press (1) for Yes, (2) for No."</p>	
<p>4.  Press (1) to confirm your Santrax ID or press (2) to retry.</p> <p style="padding-left: 20px;">Santrax will say: "Is this a group visit? Press (1) for Yes or (2) for No."</p>	
<p>5.  Press (2) for not a group visit.</p> <p style="padding-left: 20px;">Santrax will say: "Please select (1) to call in or (2) to call out."</p>	
<p>6.  Press the (1) key to "Call In".</p> <p style="padding-left: 20px;">Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."</p>	
<p>7.  Press the numbers of the client's ID.</p> <p style="padding-left: 20px;">Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."</p>	
<p>8.  Hang up.</p>	

Calling Instructions	STX«ACCOUNT»
<p>16.  The client should say their first and last name and today's date.</p> <p style="padding-left: 20px;"> Santrax will say: "In call received at (TIME). Out call received at (TIME). Total visit length (NUMBER) minutes. Press (1) to confirm, (2) to deny, (3) to replay."</p>	
<p>17.  The client should press the appropriate option.</p> <p style="padding-left: 20px;"> Santrax will say: "The service performed was (SERVICE). Press (1) to confirm, (2) to deny, (3) to replay."</p>	
<p>18.  The client should press the appropriate option.</p> <p style="padding-left: 20px;"> Santrax will say: "Thank you, bye."</p>	
<p>19.  Hang up.</p>	
<p><u>What to do if there is a Problem:</u></p>	
<p>These are some possible problems you may experience when using the telephone.</p>	
<ul style="list-style-type: none">  Busy Signal  No Answer 	
<ol style="list-style-type: none"> 1. Check the number to make sure you have the right phone number. 2. Try calling again. 3. Try calling the second toll-free number provided. 4. If you still cannot complete the call, contact your supervisor or CDS Employer, as applicable. 	
<ul style="list-style-type: none">  If the system says: "Sorry, Invalid Number" 	
<p>See if the phone has a T-P (Tone-to-pulse) switch; make sure the switch is on T. If there is no switch, you must say your ID number one digit at a time, into the phone after the tone.</p>	

Individual Visit Call Process - Multi-language Line

Call-In	
1	Dial the toll-free number.
	<p><i>Santrax will say: "For English, please press one (1). For Egyptian Arabic, please press two (2). For French, please press three (3). For Fulah, please press four (4). For Hindi, please press five (5). For Mandarin Chinese, please press six (6). For Nepali, please press seven (7). For Russian, please press eight (8). For Serbian, please press nine (9). For Somali, please press ten (10). For Spanish, press eleven (11). For Swahili, please press twelve (12). For Vietnamese, please press thirteen (13)."</i></p> <p><i>*Each prompt will be heard in its respective language.</i></p>
2	Press the number that corresponds to the desired language.
	Santrax will say: <i>"Welcome, please enter your Santrax ID."</i>
3	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	<p>Santrax will say: <i>"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."</i></p> <p>If the Santrax ID entered does not match to an employee record, Santrax will say: <i>"You have entered an invalid Santrax ID, please try again."</i></p>
4	Press 1 for Yes.
	Santrax will say: <i>"Is this a Group Visit, press 1 for Yes or 2 for No."</i>
5	Press 2 for No.
	Santrax will say: <i>"Please select 1 to call-in or 2 to call-out."</i>
6	Press 1 to call-in.
	<p>Santrax will say: <i>"Received at [Time]."</i> After a brief pause, Santrax will say: <i>"Please enter first client ID or hang up if done."</i></p> <p>If the phone number the call is coming from is only associated to more than one (1) client, enter the system generated client ID found in the client record in Sandata EVV.</p>
7	Hang up if no client ID is needed <u>or</u> all client IDs have been entered.

Call-Out	
1	Dial the toll-free number.
	<p><i>Santrax will say: "For English, please press one (1). For Egyptian Arabic, please press two (2). For French, please press three (3). For Fulah, please press four (4). For Hindi, please press five (5). For Mandarin Chinese, please press six (6). For Nepali, please press seven (7). For Russian, please press eight (8). For Serbian, please press nine (9). For Somali, please press ten (10). For Spanish, press eleven (11). For Swahili, please press twelve (12). For Vietnamese, please press thirteen (13)."</i></p> <p><i>*Each prompt will be heard in its respective language.</i></p>
2	Press the number that corresponds to the desired language.
	Santrax will say: <i>"Welcome, please enter your Santrax ID."</i>
3	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	<p>Santrax will say: <i>"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."</i></p> <p>If the Santrax ID entered does not match to an employee record, Santrax will say: <i>"You have entered an invalid Santrax ID, please try again."</i></p>
4	Press 1 for Yes.
	Santrax will say: <i>"Is this a Group Visit, press 1 for Yes or 2 for No."</i>
5	Press 2 for No.
	Santrax will say: <i>"Press 1 to call-in or 2 to call-out."</i>
6	Press 2 to call-out.
	Santrax will say: <i>"Received at [Time]."</i> After a brief pause, Santrax will say: <i>"Please enter first client ID or hang up if done."</i>
	Enter the Client ID number.
7	Santrax will say: <i>"Please enter the Service ID."</i>
	Press the three-digit ID of the care performed.
8	Santrax will say: <i>"You entered [Service description]. Please press 1 to accept, 2 to retry."</i>
	Press the 1 to accept.

After the service, Santrax will say: *“To record the client’s voice please press 1 and hand the phone to the client or press 2 if the client is unable to participate.”*

- 3) Press (1) to record client’s voice (hand phone to client):
 - a) Santrax will say: *“Please say your first and last name and today’s date.”*
 - b) The client will say their name and the date.
 - c) Santrax will say: *“In call received at [Time]. Out call received at [Time]. Total visit length [number] minutes. Press 1 to confirm, 2 to deny, 3 to replay.”*
 - d) Client will press appropriate choice.
 - e) Santrax will say: *“The service performed was [service description]. Press 1 to confirm, 2 to deny, 3 to replay.”*
 - f) Client will press appropriate choice.
 - g) Santrax will say: *“Thank you, bye.”*
 - h) Hang up.

- 4) Press (2) if the client is unable to participate.
 - a) Santrax will say: *“Thank you, bye.”*
 - b) Hang up.



For DODD clients, when Santrax prompts: *“To record the client’s voice please press 1 and hand the phone to the client or press 2 if the client is unable to participate.”*

Simply hang up to end the call since the functionality does not apply to DODD clients.

Visit Scenarios (SMC and Telephony)

Multiple clients in the same home

- If a provider cares for more than one client in the same home (e.g. husband and wife), but not at the same time:
 - SMC – the employee calls in and out for each client receiving care at that time.
 - Telephony – the employee calls in and out, entering the Client ID of the client receiving care at that time.
- If both clients in the home are receiving care, back to back:
 - SMC – the employee calls in and out for each client receiving care.
 - Telephony – the employee calls in and out for each client receiving care. The employee enters the Client ID for each client’s calls. A total of four calls are made for this type of visit.



The Client ID can be found by looking up the client’s record in the Sandata EVV *Data Entry* module or running an *Active Clients Report* in the *Reports* module.

Providing multiple services for a client during a single visit

- If an employee provides care for a single client under multiple services during a visit:
 - SMC – the employee calls in and out for each visit and service. There will be a total of four calls made for the entire visit.
 - Telephony – the employee calls in and out for each service during the visit.



After calling out for the first service, wait one minute before calling in to start the visit for the second service. If it's within the same minute, the call is treated as an extraneous call for the end-call of the first visit.

Provider providing care multiple times for a single client in one day

- If an employee cares for a single client multiple times in one day:
 - SMC – the employee calls in and out for each visit, capturing the visit hours and service performed.
 - Telephony – the employee calls in and out for each visit, capturing the visit hours and service performed.

Visit that starts and/or ends away from the client's home

- If an employee delivers care to the client outside the home, or picks up/drops off the client outside the home:
 - SMC – the employee calls in and out from the client's location outside the home.
 - Telephony – the employee calls in and out from the cell phone. Manual adjustments may need to be made in *Visit Maintenance*.



If neither SMC nor TVV are available, the agency provider enters the visit manually in *Visit Maintenance*.

Multiple providers caring for a single client at the same time

- If multiple providers deliver care to a single client at the same time:
 - SMC – each employee joins a group visit and calls in and out for their visit, capturing the visit hours and service performed.
 - Telephony – each employee joins a group visit and calls in and out for their visit, capturing the visit hours and service performed.

Overnight Visits

- If an employee provides care to a client that starts before midnight one day and ends after midnight the following day:
 - SMC – the employee will call in upon arriving and call out when leaving.
 - Telephony – the employee will call in upon arriving and call out when leaving.

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7 Visit Maintenance

Module Time

75 minutes

This lesson explains how to use the Sandata EVV *Dashboard* to monitor current day visits to view exceptions. The lesson also reviews the *Visit Maintenance* module, explaining how to navigate the screens, understand the information presented on the screen for selected visits, and how to resolve exceptions that may be linked with a visit.

Module Objectives

After completing this lesson, you will be able to:

- use the Sandata EVV *Dashboard* to monitor current day visit exceptions;
- search and review visit exceptions; and
- resolve visit exceptions.

Key Terminology

Term/Acronym	Definition
Client/Individual	A person who receives services through the Medicaid program.
Dashboard	Real-time status of the current day's visit exceptions.
Exception	Any visit data which Sandata EVV has denoted with a colored circle because it is either missing information or does not meet the rules established for the program.
Employee/Direct Care Worker	A person who is employed by an agency provider to provide care to one or more clients.
Manual Call	Corrective action for the visit exception Visit Without In-Call/Visit Without Out-Call.
Reason Code	A pre-defined list of reasons/explanations for the various correction scenarios. A reason code must be selected when making a change to data in Visit Maintenance.
Visit	A "visit" is the electronic service provided during an in-person encounter to a client in a home and community based setting.
Visit Maintenance	The module within Sandata EVV where visits can be corrected and/or acknowledged.

Introduction

The Sandata EVV *Dashboard* and *Visit Maintenance* module is designed to give users the ability to review, modify and correct Sandata EVV visits. It allows agency personnel with appropriate access the ability to monitor the current day's visit activity in real-time. It allows visits to be updated to ensure that all necessary information is included and any exceptions are corrected or acknowledged.



Visit maintenance should not be done while a visit is in process.

A visit includes an employee, a client, a service, GPS location (for SMC) or the telephone number (for TVV), the client verification information, as well as call-in and call-out times (date and time) from a client's location.

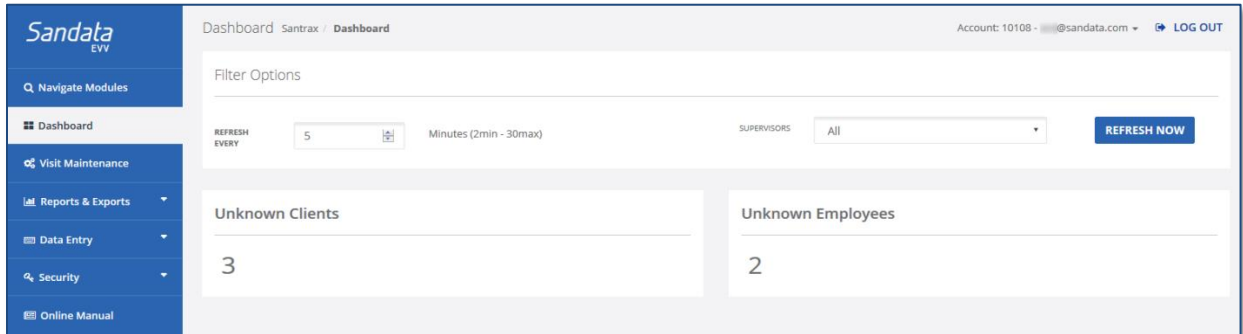
As call-in/call-out times are received by Sandata EVV, exceptions are applied based on the business rules for the specific exception. For example, 'Visit without an In Call' exception would be applied if an out call is received in the absence of an in call. There are two types of exceptions, those that must be fixed and those that must be acknowledged (e.g. Visit Verification Exception). *Visit Maintenance* allows you to correct/acknowledge the exceptions on a visit so that it can be matched to the claim submitted for the visit.



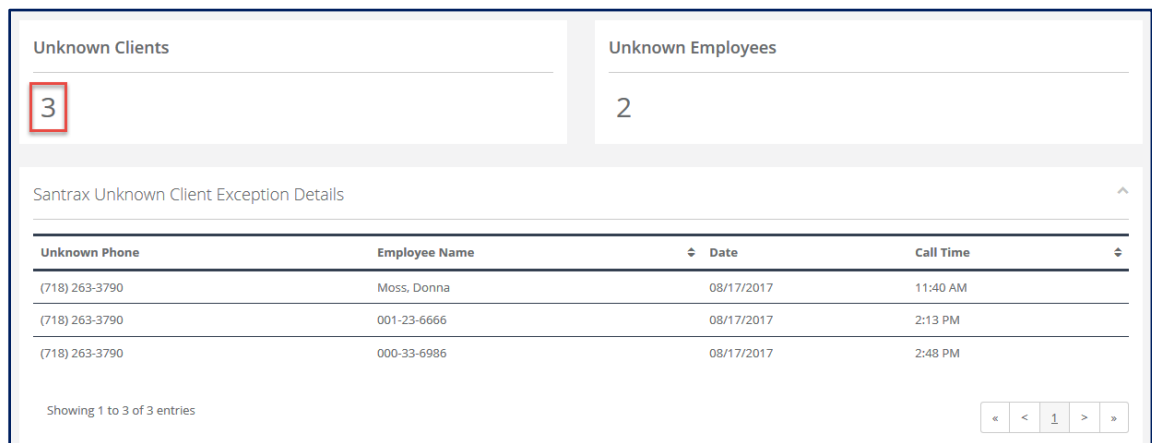
Sandata EVV is not used for billing and does not guarantee payment for a visit.

Sandata EVV Dashboard

The Sandata EVV *Dashboard* monitors current day’s visits to identify two specific exceptions. These exceptions fall into two categories—**Unknown Clients** and **Unknown Employees**. The data defaults to refresh every five minutes but can be changed to refresh between 2 – 30 minutes. All exception types can be viewed in *Visit Maintenance*.



1. Click the exception category total to display a listing of the visit exception details for that specific exception.



- Click the exception category name to link to the *Visit Maintenance* module to view and edit the visits for that exception.

Dashboard Santrax / Dashboard Account: 10060 - aso@sandata.com LOG OUT

Filter Options

REFRESH EVERY Minutes (2min - 30max) SUPERVISORS All REFRESH NOW

Unknown Clients 3

Unknown Employees 2

Visit Maintenance Visit Maintenance / Manage Visits Account: 6002 @sandata.com Enter agency LOG OUT

Select a Visit CREATE CALL

DATE RANGE MM/DD/YYYY 03/30/2019 to 04/08/2019 CLIENT Enter Client EMPLOYEE Enter Employee

CATEGORY Select Category PAYER Select Payer VISIT STATUS Select Visit Status CLIENT MEDICAID ID Enter Client Medicaid ID

FILTER VISITS BY Exception Types EXCEPTION TYPES Unknown Clients Show advanced filter options

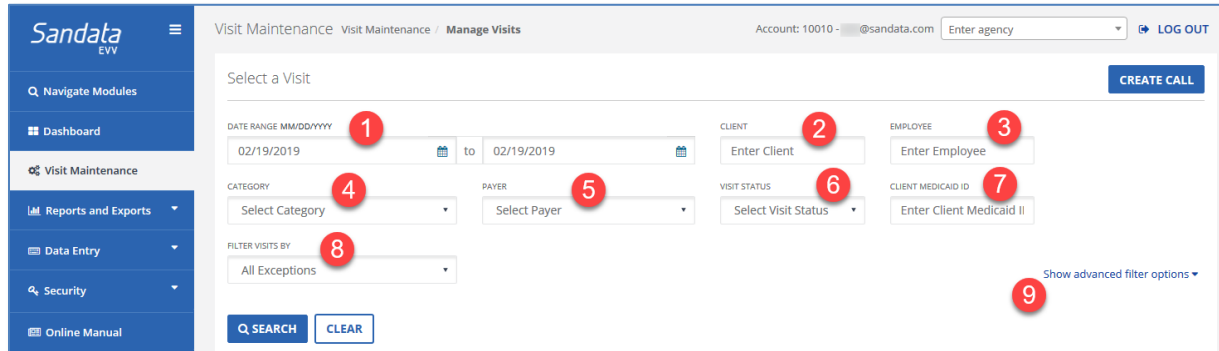
SEARCH CLEAR EXPORT

Show: 50 per page Show Display Options

Showing 1 to 18 of 18 entries

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Approved
	jones, Jim	OHCW Nsg - RN (T1002)	04/04/2019	11:49 AM	11:50 AM	00:01				00:01	Incomplete	<input type="checkbox"/>	<input type="checkbox"/>
	jones, Jim	Passport - LPN (T1003)	04/04/2019		09:47 AM					[...]	Incomplete	<input type="checkbox"/>	<input type="checkbox"/>

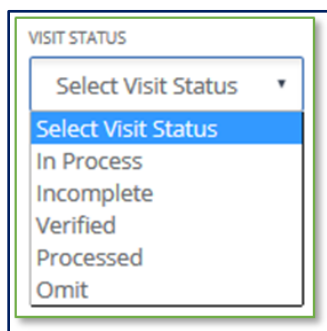
Visit Maintenance – Main Screen



Search Filters

In *Visit Maintenance*, search filters are used to set up parameters to find visits to review and are located on the top half of the *Visit Maintenance* screen. The search results include all data that falls within the specified parameters.

1. **DATE RANGE:** The date fields default to the current date and can be changed by clicking in the date field and typing the date or clicking on the calendar icon to select a date using the pop-up calendar.
2. **CLIENT:** Enter all or part of client’s last name to filter the visit data for that client.
3. **EMPLOYEE:** Enter all or part of employee’s last name to filter the visit data for that employee.
4. **CATEGORY:** This field is not applicable for the Ohio EVV program.
5. **PAYER:** This drop-down contains a list of Payers. Selecting a Payer determines the options available in the **PROGRAM** filter under the *Advance Filter Options*.
6. **VISIT STATUS:** This filter allows a user to filter visits by their status. The options include:



Status	Description
In Process	A visit has started and not yet completed
Incomplete	A visit has exceeded a 24-hr period and is still missing a call-in/call-out
Verified	A visit that does not contain any exceptions
Processed	A visit that does not contain any exceptions and has been returned to the claims validation engine at least once
Omit	A visit that is marked 'Do Not Bill'

7. **CLIENT MEDICAID ID:** Enter the client’s 12-digit Medicaid ID.

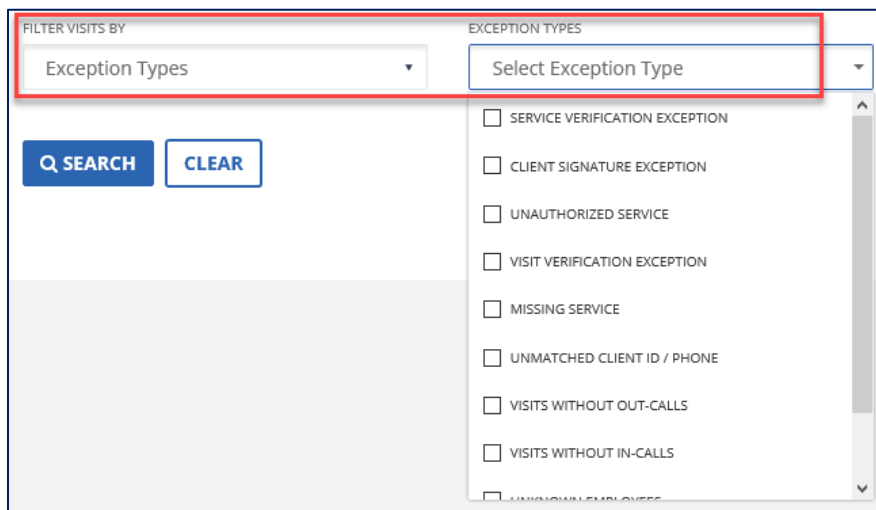
8. **FILTER VISITS BY:**

- **All Exceptions:** This default setting displays all visits containing one or more exceptions within a specified time period.



The exceptions triggered for a visit are based on payer requirements.

- **Exception Types:** This option selects visits based on the exceptions which apply to the visit. When selected, an additional field appears prompting the user to choose the specific exception type(s) from the additional drop-down field.

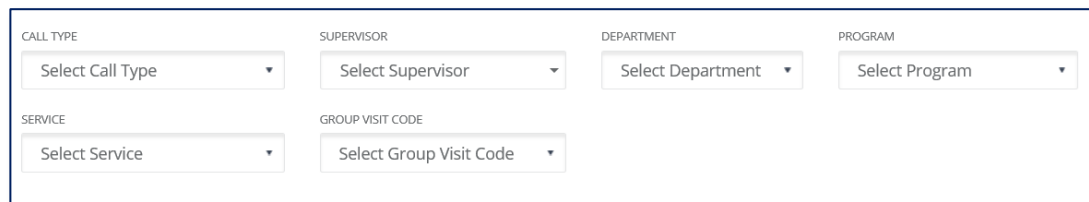


Exception	Description
CLIENT SIGNATURE EXCEPTION	Client’s digital signature or voice recording is missing.
MISSING SERVICE	Identifies when the service provided for the visit is not specified during the SMC call-in or Telephony call-out.
SERVICE VERIFICATION EXCEPTION	Client did not confirm the selected service.

Exception	Description
UNAUTHORIZED SERVICE	This exception occurs when an employee selects a service for a visit that does not match to the service the client receives. The exception must be fixed in the Visit Details screen.
UNKNOWN CLIENTS	Identifies when a visit occurs where the client is not known. This can occur when the Medicaid ID entered does not match to an existing client or the phone number entered does not match to a known client.
UNKNOWN EMPLOYEES	Identifies when the Santrax ID entered during a Telephony call does not match to any known employee.
UNMATCHED CLIENT PHONE/ID	Identifies when a client ID is entered during a Telephony call, but the phone number the call was made from is not a number listed for the client.
VISIT VERIFICATION EXCEPTION	Identifies when the start and/or end time have not been verified by the client at the end of the visit, either by confirming during the SMC call-out or verifying the times during the Telephony call-out.
VISIT WITHOUT IN-CALLS	Identifies a visit which does not have a call-in.
VISIT WITHOUT OUT-CALLS	Identifies a visit which does not have a call-out.

- **All Visits:** Sandata EVV will show all visits (including those with exceptions) in the search results for a specified time period.

9. **Show Advanced Filter Options:** Displays additional filters such as **Call Type**, **Supervisor** and **Department**.

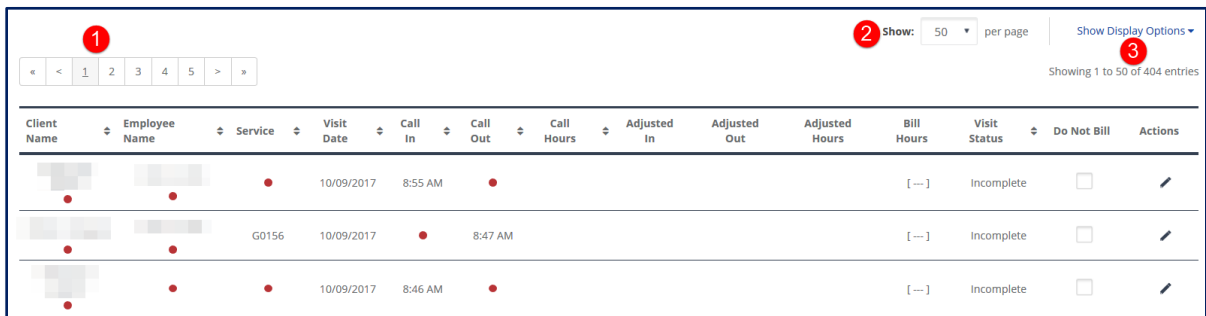



- **CALL TYPE:** Filter visits to show only **MVV** (mobile) or **Manual** calls.
- **SUPERVISOR:** This filter is not applicable for the Ohio EVV program.

- **DEPARTMENT:** This filter is not applicable for the Ohio EVV program.
- **PROGRAM:** Filter visits for a specific program from the drop-down list. Available options are based on the selection in the **PAYER** filter.
- **SERVICE:** Filter visits for a specific service from the drop-down list. Available options are based on the selection in the **PROGRAM** filter.
- **GROUP VISIT CODE:** Filter visits for a specific group visit code or select from the drop-down list. If the date range specified in the search filters is seven (7) days or less, the field will display a drop-down list. If the date range specified in the search filters is greater than seven (7) days, the group visit code will need to be type into the field.

Search Results – Understanding the Visit Grid

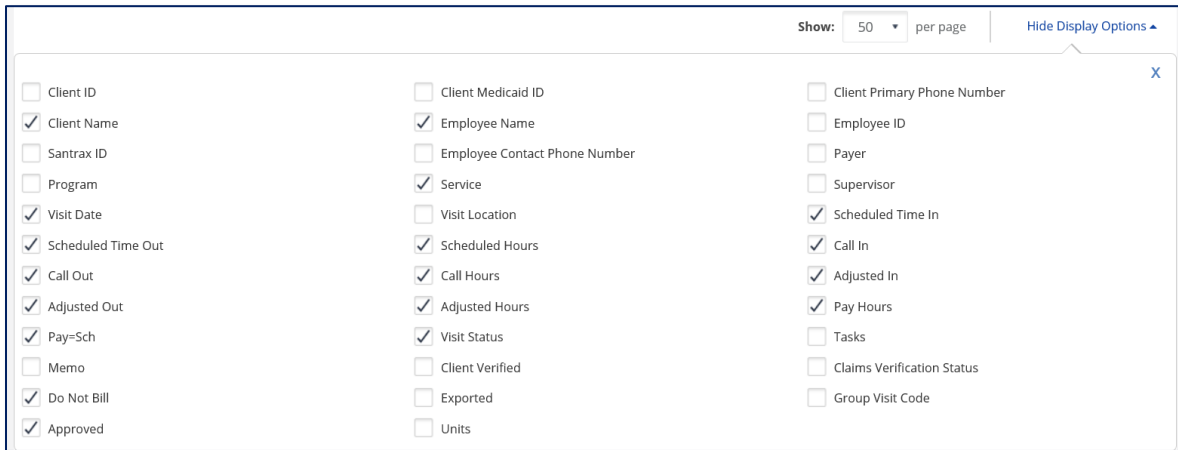
When the filters are applied and a search is performed, the results are displayed in the visit grid at the bottom portion of the screen.



Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Actions
[Redacted]	[Redacted]	[Redacted]	10/09/2017	8:55 AM	[Redacted]					[--]	Incomplete	<input type="checkbox"/>	
[Redacted]	[Redacted]	G0156	10/09/2017	[Redacted]	8:47 AM					[--]	Incomplete	<input type="checkbox"/>	
[Redacted]	[Redacted]	[Redacted]	10/09/2017	8:46 AM	[Redacted]					[--]	Incomplete	<input type="checkbox"/>	

The top of the visit grid displays the following options:

1. Pagination arrows are used to move forward/backward a page, jump to a specific page or first/last page.
2. Lines per page setting to adjust the number of lines per page (default = 50)
3. A **Show Display Options** link allows the user to select additional data elements to display in the visit grid.




Any additional data element selected from the **Display Options** link is only available during the current session. Upon logging out and logging back in to Sandata EVV, the visit grid returns to the default display. To keep the added display options, click **SAVE SETTINGS** in the Show Advanced Filter Options link.



Check the **Units** box to show the units as a column in the visit grid.


The data within the visit grid can be sorted by clicking on any of the following column headers:

- **Client Name**
- **Employee Name**
- **Service**
- **Visit Date**
- **Call-In**
- **Call-Out**
- **Call-Hours**
- **Visit Status**



Hovering the mouse over an exception indicator displays a tool tip for that exception detail.

Reviewing a Visit

To view the details of a visit, either click on the visit line or click **Edit**  to the right of the line to display the *Visit Details* screen.



When clicking on a data element on the visit line, the *Visit Details* screen opens directly to that section of the visit.

The top of *Visit Details* screen contains the **CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME** and **EMPLOYEE ID** information. There are also tabs on the left which display various details of the visit.

Visit Details X				
CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Carter, John	59647013	999888555101	Young, Charles	

- **GENERAL:** contains the **CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME, EMPLOYEE ID, SCHEDULE IN, SCHEDULE OUT, SCHEDULE HOURS, VISIT START DATE, VISIT END DATE, VISIT TIME ZONE, VISIT STATUS, CALL IN, CALL OUT, CALL HOURS, UNITS, ADJUSTED IN DATE, ADJUSTED IN, ADJUSTED OUT DATE, ADJUSTED OUT, AGENCY ID, AGENCY NAME, PAY HOURS, PAYER, PROGRAM, SERVICE, GROUP VISIT CODE, BILL CODE**, client verification results (**CLIENT VERIFIED TIME, CLIENT VERIFIED**

SERVICE), CLIENT SIGNATURE (signature or voice recording), **VISIT SOURCE, SCHEDULE ID, DO NOT BILL** and **APPROVED** (not applicable for the ODM program).



If the Service for a visit is associated with multiple payers, the **PAYER** and **PROGRAM** fields are editable to select values from the drop-down lists.

Visit Details
Visit Start Date: 03/11/2019 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Jones, Lisa	531549	121353444777	Benson, Kelly	

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

VISIT START DATE

VISIT END DATE

VISIT TIME ZONE

VISIT STATUS

CALL IN

CALL OUT

CALL HOURS

UNITS

ADJUSTED IN DATE

ADJUSTED IN HH:MM AM/PM

ADJUSTED OUT DATE

ADJUSTED OUT HH:MM AM/PM

AGENCY ID

AGENCY NAME

BILL HOURS

PAYER

PROGRAM

SERVICE

GROUP VISIT CODE

CLIENT VERIFIED TIME

CLIENT VERIFIED SERVICE

CLIENT SIGNATURE

VISIT SOURCE

DO NOT BILL

APPROVED

- **CLIENT:** This screen displays the client’s details such as **ADDRESS, PHONE NUMBER** and **LANGUAGE PREFERENCE.**

GENERAL	ADDRESS LINE 1 Marshall Street	ADDRESS LINE 2 None	CITY Elmont	
CLIENT	STATE NY	ZIP CODE 11003-0000	PRIMARY PHONE # [REDACTED]	TIME ZONE US/Eastern
EMPLOYEE	GENDER Male	LANGUAGE PREFERENCE Russian	SUPERVISOR None	
CALL LOG	Find Client			
EXCEPTIONS	LAST NAME Enter Last Name	FIRST NAME Enter First Name	CLIENT ID # Enter Client ID #	
GPS	Q			
MEMO				

The screen also includes an option to change the client for the visit, in instances when the client is unknown or was entered incorrectly and to include inactive clients in the search.

CLAIMS	Find Client				
HISTORY	LAST NAME c	FIRST NAME Enter First Name	CLIENT ID # Enter Client ID #		
	Q				
	CLIENT MEDICAID ID Enter Client Medicaid ID	<input type="checkbox"/> INCLUDE INACTIVE CLIENTS			
Actions	Last Name	First Name	Client ID #	Primary Phone #	Client Medicaid ID
<input type="radio"/>	Client	Test	585689		
Showing 1 to 1 of 1 entries					
<input type="button" value="«"/> <input type="button" value="<"/> <input type="button" value="1"/> <input type="button" value=">"/> <input type="button" value="»"/>					

- **EMPLOYEE:** This screen displays the employee details such as: **EMPLOYEE EMAIL, SANTRAX ID, ADDRESS and PHONE.**

GENERAL	EMPLOYEE EMAIL dmoss@mailinator.com	SANTRAX ID 000046258		
CLIENT				
EMPLOYEE	ADDRESS None	ADDRESS LINE 2 None	CITY None	STATE None
CALL LOG	ZIP CODE None	DISCIPLINE None	PHONE None	
MERGE CALLS				

The screen also includes an option to change the employee for the visit, in instances when an incorrect Santrax ID was entered for the visit. An option is available to include inactive employees in the search.

Visit Details Visit Start Date: 04/09/2018 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Ross, Doug	9003	333444555		

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

TASKS

No Employee has been associated with this visit.

Find Employee

LAST NAME	FIRST NAME	EMPLOYEE ID #	DISCIPLINE
<input type="text" value="Last Name"/>	<input type="text" value="First Name"/>	<input type="text" value="Employee ID #"/>	<input type="text" value="Select Disciplir"/>

INCLUDE INACTIVE EMPLOYEE

- **CALL LOG:** This screen shows the details of the call-in/call-out times and the type of call (Mobile, Telephony or Manual).

GENERAL	CALL IN CLIENT ID#			
CLIENT	CALL DATE	CALL TIME	CALL TYPE	SERVICE
EMPLOYEE	08/14/2017	3:13 PM	EV (telephony)	N/A
CALL LOG	USER	ORIGINATING PHONE #	CALL SOURCE	
MERGE CALLS	000046258	(917) 972-7973	SANDATA	
EXCEPTIONS	CALL OUT CLIENT ID# 0059647013			
GPS	CALL DATE	CALL TIME	CALL TYPE	SERVICE
	08/14/2017	4:06 PM	EV (telephony)	G0156
	USER	ORIGINATING PHONE #	CALL SOURCE	
	000046258	(917) 972-7973	SANDATA	

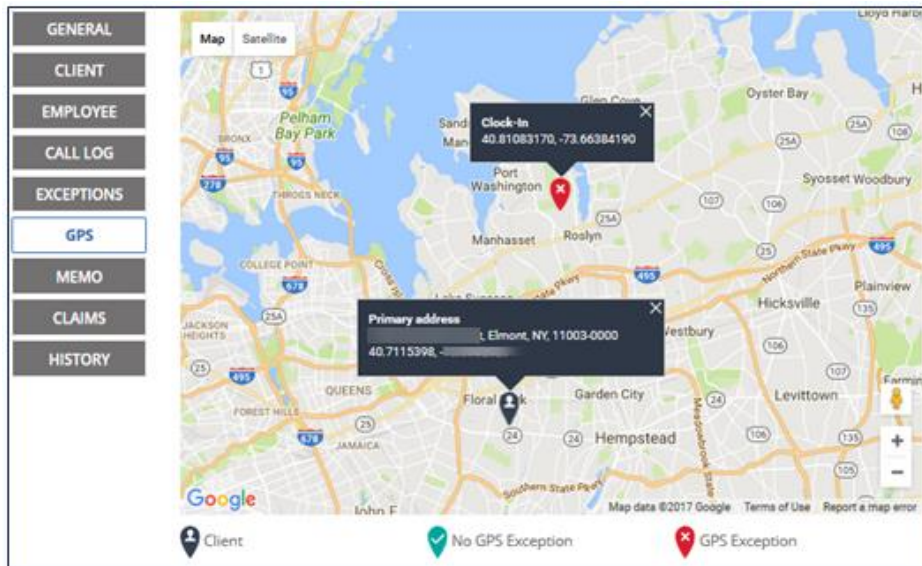
- **MERGE CALLS:** This screen appears if a visit is missing a call time. It shows a list of available calls that may be merged to the visit. Calls can be merged if there are within time proximity and not associated with any other visit.

GENERAL	Below is a list of all calls that are close to the scheduled time.					
CLIENT	PHONE #	CALL TIME	CALL DATE	CLIENT NAME	EMPLOYEE NAME	
EMPLOYEE	<input type="radio"/>	[REDACTED]	2:02 PM	8/14/2017	Carter, John	001-06-6825
CALL LOG	<input type="radio"/>	[REDACTED]	2:47 PM	8/14/2017	Carter, John	Young, Charles
MERGE CALLS	<input type="radio"/>	[REDACTED]	3:38 PM	8/14/2017	Carter, John	000-44-6258
EXCEPTIONS	Showing 1 to 3 of 3 entries					
GPS	<input type="button" value="←"/> <input type="button" value="<"/> <input type="button" value="1"/> <input type="button" value=">"/> <input type="button" value="→"/>					
MEMO						

- **EXCEPTIONS:** This screen lists all the visit exceptions for the visit, along with the available option to resolve each exception.

GENERAL	<input checked="" type="radio"/> Visits Without In-Calls	This exception needs to be fixed	
CLIENT	<input checked="" type="radio"/> Missing Service	This exception needs to be fixed	
EMPLOYEE	<input checked="" type="radio"/> Visit Verification Exception	<input type="checkbox"/> ACKNOWLEDGE THIS EXCEPTION	
CALL LOG	REASON CODE *	RESOLUTION CODE	REASON NOTE
MERGE CALLS	Select Reason ▼	Select Resoluti ▼	Enter Reason Note
EXCEPTIONS	<input type="button" value="SAVE"/>		
GPS	<input checked="" type="radio"/> Client Signature Exception	<input type="checkbox"/> ACKNOWLEDGE THIS EXCEPTION	
MEMO	REASON CODE *	RESOLUTION CODE	REASON NOTE
CLAIMS	Select Reason ▼	Select Resoluti ▼	Enter Reason Note
HISTORY	<input type="button" value="SAVE"/>		

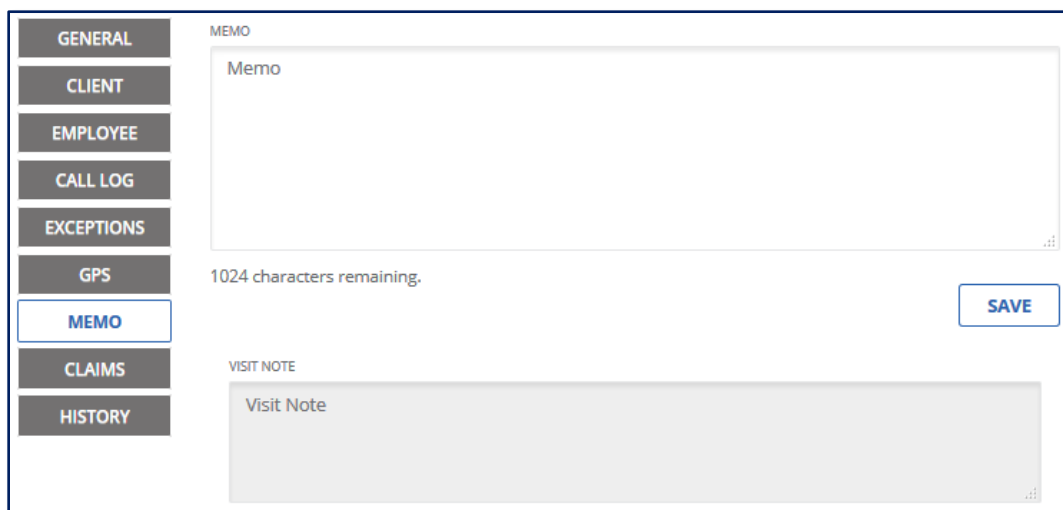
- **GPS:** This screen shows the location of the SMC call-in/call-out times relative to the client’s home.



- **MEMO:** This screen allows the user to make a note and display notes previously entered related to the visit. It also includes a *Visit Note* screen which displays notes entered into SMC during call-out.



This information should not be used to fulfill ODM documentation requirement.



- **CLAIMS:** This screen shows the batch, transaction and date/time each time the visit was returned to the MITS adjudication system.

GENERAL	BATCH ID	TRANSACTION ID	DATE RETURNED FOR CLAIMS PROCESSING	INTERNAL CONTROL NUMBER	DETAIL LINE NUMBER	MODIFIER	BILLED UNITS
CLIENT			12/12/2018 ...		05		32
EMPLOYEE			12/12/2018 ...		05		32
CALL LOG			12/12/2018 ...		05		32
EXCEPTIONS							
GPS							
MEMO							
CLAIMS							
HISTORY							

Showing 1 to 3 of 3 entries

« < 1 > »

- **HISTORY:** This screen contains the audit history for the visit. Any change made to the visit is tracked and listed on this screen with the most recent change at the top.

GENERAL	REASON CODE	ITEM	DATE	CHANGED BY
CLIENT	26 - DCW/NAP Forgot to Call Out	Visit - Update Service	10/10/2017 12:45:52 PM	
EMPLOYEE				
CALL LOG	26 - DCW/NAP Forgot to Call Out	Visit - Update Adjusted Hours	10/10/2017 12:45:52 PM	
EXCEPTIONS				
GPS				
MEMO				
CLAIMS				
HISTORY				

Showing 1 to 2 of 2 entries

« < 1 > »

Identifying Exceptions

Visit exceptions are indicated by a colored circle under one or more columns where the exception exists. The columns are: **Client Name**, **Employee Name**, **Service**, **Call In** or **Call Out**.

- An exception indicates the visit is missing information or the information captured does not meet program requirements.
- A visit may have one or more exception(s).
- Hovering over an indicator displays a pop-up showing the description of the exception(s).

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours
Carter, John	Young, Charles	●	08/14/2017	●	2:47 PM				
Carter, John	Young, Charles	●	08/14/2017	●	2:46 PM				
Carter, John	000-44-6258	●	08/14/2017						

Exceptions:
Visits without in-calls

- Visit exceptions can be reviewed by clicking the **Exceptions** link when viewing the *Visit Details* screen.
- Certain exceptions (**Visit Verification**, **Service Verification**, **Signature Verification** and **Unmatched Client Phone/ID**) can also be cleared from this screen.

Visit Details ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Carter, John	59647013	999888555101	000-44-6258	

GENERAL

● Unknown Employees This exception needs to be fixed

CLIENT

● Visits Without Out-Calls This exception needs to be fixed

EMPLOYEE

● Missing Service This exception needs to be fixed

CALL LOG

● Visit Verification Exception ACKNOWLEDGE THIS EXCEPTION

MERGE CALLS

● Client Signature Exception ACKNOWLEDGE THIS EXCEPTION

EXCEPTIONS

REASON CODE *

RESOLUTION CODE

REASON NOTE

REASON CODE *

RESOLUTION CODE

REASON NOTE

Correcting Exceptions

The condition causing the exceptions must be fixed or where it is not possible, acknowledged before a visit is matched to a claim. Every visit adjustment or correction requires the user to select a reason code, resolution code and in some cases, additional notes.



The available reason codes are:

Select Reason Code
10 Individual Data Issue
20 DCW/NAP Error
30 Device Issue
40 Telephony Issue
50 Individual Refused Verification
55 Individual Unable to Verify
57 Verification Attempt Failed
60 Split Visit – Overtime
65 Split Visit – Multiple Programs
67 Split Visit – Home Care Attendant
70 Individual Is Displaced
80 Retroactive Eligibility Determination
85 Retroactive Payer Change
90 Group Visit

Missing Service Exception

Identifies when the service provided for the visits is not specified during the SMC call-in or Telephony call-out. This type of exception must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the **Service** column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours
Moss, Donna	000912293		04/08/2019	09:35 PM		

Exceptions:
Missing Service

2. Select the correct service from the **SERVICE** field drop-down list.

- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

VISIT START DATE
04/04/2019

VISIT END DATE
04/04/2019

VISIT TIME ZONE
US/Eastern

VISIT STATUS
Incomplete

CALL IN
01:32 PM

CALL OUT
01:36 PM

CALL HOURS
00:04

UNITS
1

ADJUSTED IN DATE
04/04/2019

ADJUSTED IN HH:MM AM/PM
01:32 PM

ADJUSTED OUT DATE
04/04/2019

ADJUSTED OUT HH:MM AM/PM
01:36 PM

AGENCY ID
6002

AGENCY NAME
Agency 1 Train the Trainer

BILL HOURS
00:04

PAYER
ODM

PROGRAM
Select Program

SERVICE
Select Service

GROUP VISIT CODE

CLIENT VERIFIED TIME
No


CLIENT VERIFIED SERVICE
No

VISIT SOURCE
SANDATA

DO NOT BILL
 APPROVED

- Select Service
- SPHH Nsg - RN (G0299)
- MyCare - HCA (S5125)
- PDN (T1000)
- RN Assessment (T1001)
- SPHH Aide (G0156)
- MyCare - LPN (T1003)
- Passport HCA Personal Care (S5125)
- HPC
- Passport - PCA (T1019)

3. Select a **REASON CODE** that best explains why the service was not selected at the time of visit.



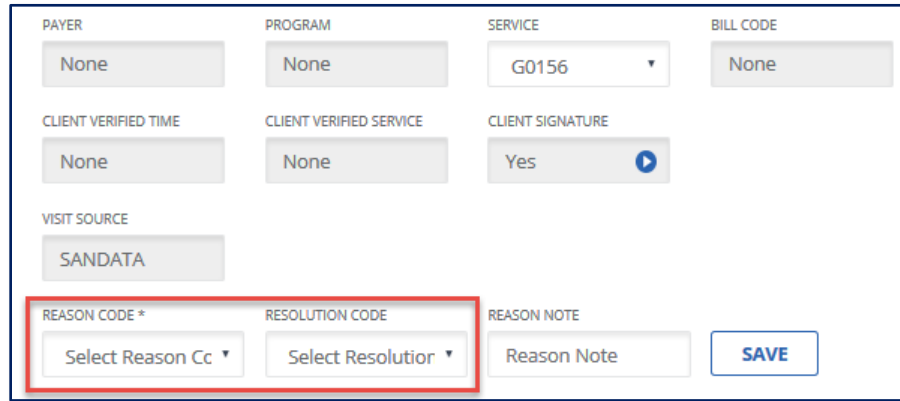
Some reason codes require a **REASON NOTE** before clicking **SAVE**.

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4. Select a **RESOLUTION CODE** from the list.



5. Click **SAVE**.

Client Signature Exception

Identifies when the client signature or voice recording is not captured during the SMC call-out or the client voice recording is not captured during the Telephony call-out. This exception type must be acknowledged for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the **Client Name** column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
Moss, Donna	Young, Charlie	●	04/08/2019	09:36 PM	09:39 PM	00:03		
<div style="border: 1px solid black; padding: 2px;"> Exceptions: Client Signature Exception ● 00912293 Visit Verification Exception ● </div>		●	04/08/2019	09:35 PM	●			

2. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Client Signature Exception line.

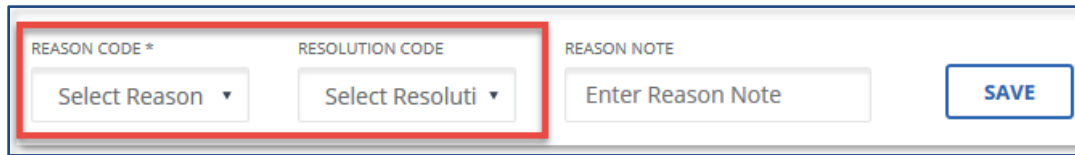


3. Select a **REASON CODE** from the list.



Some reason codes require a **REASON NOTE** before clicking **SAVE**.

4. Select a **RESOLUTION CODE** from the list.



5. Click **SAVE**.

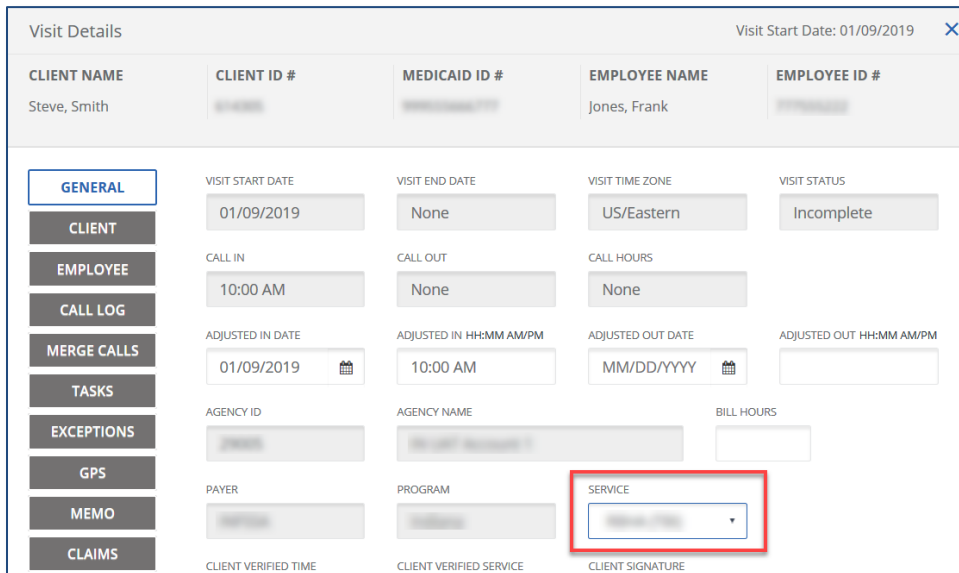
Unauthorized Service Exception

Identifies when the service selected is not valid for the client. Valid services are based on the client’s association to one or more payers and their associated services. The user will need to:

1. Click the exception indicator under the **Service** column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
Smith, Sam	Young, Charlie	SPHH Aide (G0156)	04/04/2019	07:23 AM	07:28 AM	00:05		
	jones, Jim	Unauthorized Service	4/03/2019	03:58 PM				

2. Select the appropriate service from the drop-down list. Note that the authorized services for the client must be received in order to fix this exception.

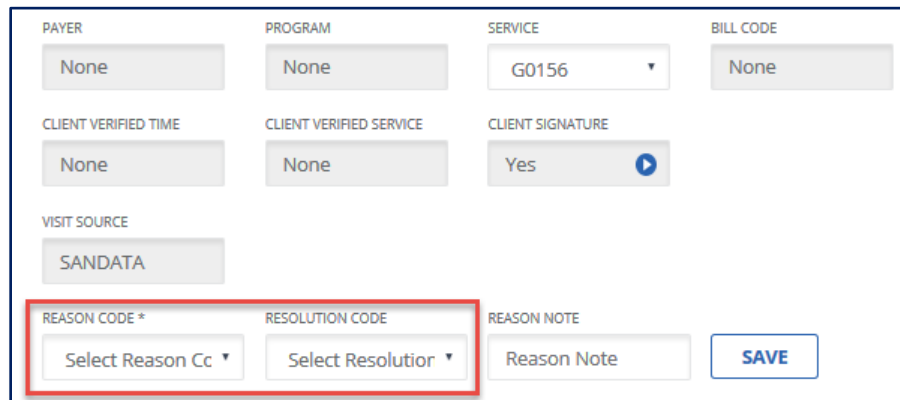


3. Select a **REASON CODE** that best explains why the service was not selected at the time of visit.



Some reason codes require a **REASON NOTE** before clicking **SAVE**.

4. Select a **RESOLUTION CODE** from the list.




The screenshot shows a form with several fields: PAYER (None), PROGRAM (None), SERVICE (G0156), BILL CODE (None), CLIENT VERIFIED TIME (None), CLIENT VERIFIED SERVICE (None), CLIENT SIGNATURE (Yes), VISIT SOURCE (SANDATA), REASON CODE * (Select Reason Cc), RESOLUTION CODE (Select Resolution), REASON NOTE (Reason Note), and a SAVE button. The REASON CODE and RESOLUTION CODE fields are highlighted with a red box.

5. Click **SAVE**.

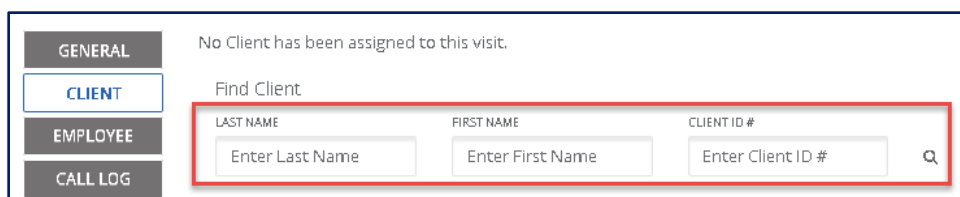
Unknown Client Exception

Identifies when a visit occurs where the client is not known. This can occur when the Medicaid ID entered does not match to an existing client or the phone number entered does not match to a known client. This exception type must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the unknown ID under the **Client Name** column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
 jones, jim		OHCW Nsg - RN (T1002)	04/04/2019	11:49 AM	11:50 AM	00:01		
		Passport -			09:47			

2. Use the search fields to search for the client.



The screenshot shows a search interface with a sidebar containing 'GENERAL', 'CLIENT', 'EMPLOYEE', and 'CALL LOG'. The main area displays 'No Client has been assigned to this visit.' Below this is a 'Find Client' section with three input fields: 'LAST NAME' (Enter Last Name), 'FIRST NAME' (Enter First Name), and 'CLIENT ID #' (Enter Client ID #). A search icon is located to the right of the input fields. The search fields are highlighted with a red box.

3. Select the client from the search results.

CLIENT

EMPLOYEE

CALL LOG

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

Find Client

LAST NAME: FIRST NAME: CLIENT ID #:

Actions	Last Name	First Name	Client ID #	Primary Phone #	Medicaid ID
<input type="radio"/>	Green	Greg	70321170	5161234567	555566667890
<input checked="" type="radio"/>	Greene	Mark	2687272	9999999999	748748748748

Showing 1 to 2 of 2 entries

REASON CODE * RESOLUTION CODE * REASON NOTE

4. Select a **REASON CODE** from the list.



Some reason codes require a **REASON NOTE** before clicking **SAVE**.

5. Select a **RESOLUTION CODE** from the list.

REASON CODE * RESOLUTION CODE REASON NOTE

6. Click **SAVE**.

Unknown Employee Exception

Identifies when the Santrax ID entered during a Telephony call-in/call-out does not match to any known employee. The ID entered is displayed instead of the employee name. This exception type must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the unknown ID in under the **Employee Name** column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
Moss, Donna	Santrax ID: Employee ID: Employee Contact Phone Number:		04/09/2019	08:52 AM				
Moss, Donna	000912293		04/08/2019	09:35 PM				

2. Use the search fields to search for the employee.
3. Select an employee from the search results.

CLIENT

Find Employee

EMPLOYEE

LAST NAME

FIRST NAME

EMPLOYEE ID #

DISCIPLINE

v

First Name

Employee ID #

Select Discipline ▼

Q

Actions	Last Name	First Name	Employee ID	Santrax ID	Discipline
<input checked="" type="radio"/>	Vi	Michael	986532	000027419	HCA
<input type="radio"/>	vera	vera	8888888888	000278215	

4. Select a **REASON CODE** from the list.



Some reason codes require a **REASON NOTE** before clicking **SAVE**.

5. Select a **RESOLUTION CODE** from the list.

REASON CODE *

RESOLUTION CODE

REASON NOTE

Select Reason ▼

Select Resoluti ▼

Enter Reason Note

SAVE

6. Click **SAVE**.

Unmatched Client Phone/ID

Identifies when a client ID is entered during a Telephony call, but the phone number the call was made from is not a number listed for the client. This exception type must be acknowledged for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Unmatched Client ID / Phone exception line.

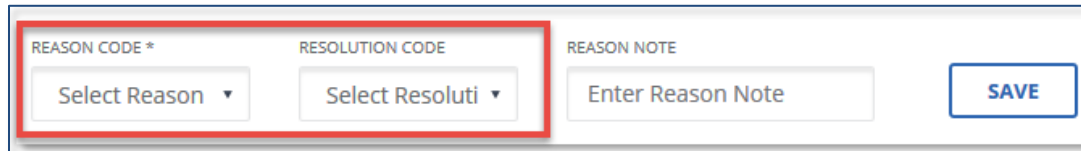


2. Select a **REASON CODE** from the list.



Some reason codes require a **REASON NOTE** before clicking **SAVE**.

3. Select a **RESOLUTION CODE** from the list.



4. Click **SAVE**. The *Call Log* screen shows the originating phone number for the call.

GENERAL	CALL IN		CLIENT ID# 0059647013	
CLIENT	CALL DATE	CALL TIME	CALL TYPE	SERVICE
	08/16/2017	6:48 AM	EW (telephony)	N/A
EMPLOYEE	USER	ORIGINATING PHONE #	CALL SOURCE	
CALL LOG	000106825	(718) [REDACTED]	SANDATA	

Service Verification Exception

Identifies when the service selected for the visit was not confirmed by the client. This exception type must be acknowledged for the visit to be in a verified state and eligible to be matched to a submitted claim.

1. Click the exception indicator under the **Client Name** column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out
Moss, Donna	Young, Charlie	SPHH Aide (G0156)	04/10/2019	04:25 AM	04:37 AM	00:12		
<div style="background-color: #333; color: white; padding: 5px;"> Exceptions: Client Signature Exception Visit Verification Exception Service Verification Exception </div>								
	g, Charlie	OHCW PCA (T1019)	04/08/2019	12:17 PM				

2. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Visit Verification Exception line.

● Service Verification Exception ACKNOWLEDGE THIS EXCEPTION

3. Select a **REASON CODE** from the list.



Some reason codes require a **REASON NOTE** before clicking **SAVE**.

4. Select a **RESOLUTION CODE** from the list.

● Service Verification Exception ACKNOWLEDGE THIS EXCEPTION

REASON CODE * RESOLUTION CODE REASON NOTE

5. Click **SAVE**.

Visit Verification Exception

Identifies when the start and end time has not been verified by the client at the end of the visit, either by confirming during the SMC call-out or the client verifies time during the Telephony call-out. This exception type must be acknowledged for the visit to be in a verified state and eligible to be matched to a submitted claim.

- Click the exception indicator under the **Client Name** column.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	
Moss, Donna	Young, Charlie	SPHH Aide (G0156)	04/10/2019	04:25 AM	04:37 AM	00:12			
<div style="border: 1px solid black; padding: 2px;"> <p>Exceptions:</p> <ul style="list-style-type: none"> Client Signature Exception Visit Verification Exception Service Verification Exception </div>									
	g, Charlie	OHCW PCA (T1019)	04/08/2019	12:17 PM					

- Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Visit Verification Exception line.

● Visit Verification Exception
 ACKNOWLEDGE THIS EXCEPTION

REASON CODE * **RESOLUTION CODE** **REASON NOTE**

- Select a **REASON CODE** from the list.



Some reason codes require a **REASON NOTE** before clicking **SAVE**.

- Select a **RESOLUTION CODE** from the list.

● Visit Verification Exception
 ACKNOWLEDGE THIS EXCEPTION

REASON CODE * **RESOLUTION CODE *** **REASON NOTE**

- Click **SAVE**.

Visit Without In-Call/Visit Without Out-Call

Identifies a visit which does not have a call-in or call-out time. This exception type must be fixed for the visit to be in a verified state and eligible to be matched to a submitted claim.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out
Moss, Donna	Young, Charlie	OHCW PCA (T1019)	04/04/2019		06:00 AM
Moss, Donna	Young, Charlie	OHCW PCA (T1019)	04/04/2019		06:00 AM

Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours
Moss, Donna	Young, Charlie	OHCW PCA (T1019)	04/08/2019	12:17 PM		
Grey, Jean		SPHH Aide	04/08/2019	12:17 PM		

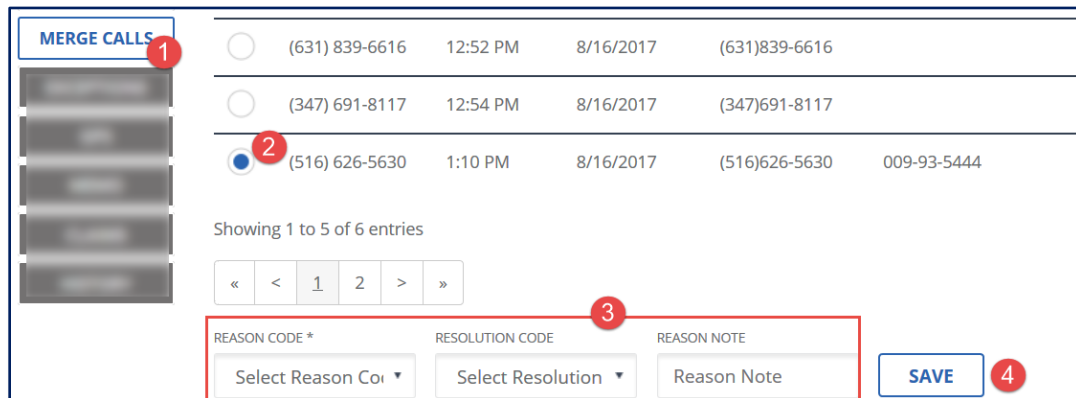


When a user clicks the exception indicator under the call time column, the *Visit Details* screen automatically opens to the *Call Log* screen.

It is recommended to go to the *Merge Calls* screen first to see if there are any available calls that can be merged. If there are none, the user can go back to the *Call Log* to manually add a call time.

Merge Calls

The **MERGE CALLS** screen appears if a visit is missing a call-in or call-out time. This screen displays available unknown calls that may be inserted/merged with the visit, after proper follow up confirming that care was provided.



The screenshot shows the MERGE CALLS interface. Callout 1 points to the 'MERGE CALLS' header. Callout 2 points to a radio button next to a call entry. Callout 3 points to the 'REASON CODE *', 'RESOLUTION CODE', and 'REASON NOTE' fields. Callout 4 points to the 'SAVE' button.

REASON CODE *	RESOLUTION CODE	REASON NOTE
Select Reason Code	Select Resolution	Reason Note

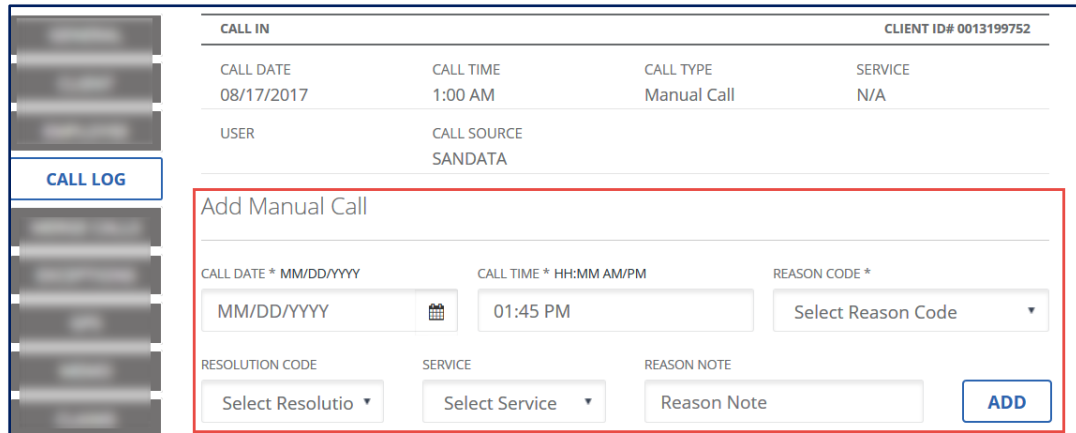
From the *Visit Details* screen:

1. Click the **MERGE CALLS** link to see if there are any available calls that can be merged to the visit.
2. Click the radio button next to the line to select the call, if there is a call to merge.
3. Select the **REASON CODE** and **RESOLUTION CODE** and **REASON NOTE**, if needed.
4. Click **SAVE**.

Add Manual Call


When a visit is missing a call time and there is no appropriate that can be merged, a manual call must be added. Once a visit has both calls, the bill hours are calculated for the visit.

There may be additional exceptions associated with the visit that need to be fixed or acknowledged for the visit to be matched to a claim.



CALL IN		CLIENT ID# 0013199752	
CALL DATE	CALL TIME	CALL TYPE	SERVICE
08/17/2017	1:00 AM	Manual Call	N/A
USER	CALL SOURCE		
	SANDATA		

Add Manual Call

CALL DATE * MM/DD/YYYY: 

CALL TIME * HH:MM AM/PM:

REASON CODE *:

RESOLUTION CODE:

SERVICE:

REASON NOTE:

ADD

From the *Visit Details* screen:

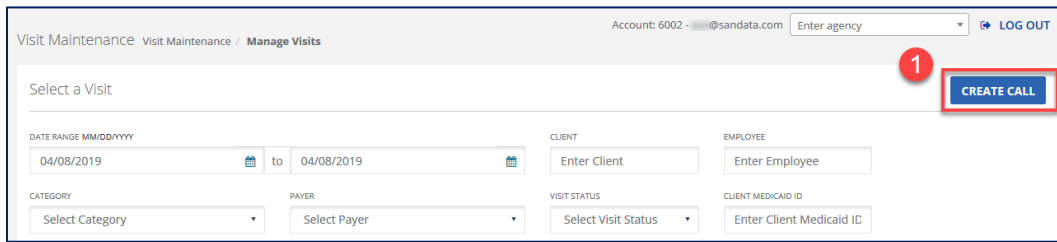
1. Click **CALL LOG**.
2. Enter the appropriate information into the fields.
3. Select the **REASON CODE**, **RESOLUTION CODE**, **SERVICE** and **REASON NOTE**, if needed.
4. Click **ADD**.

Create Call

The Create Call feature allows the office user to create a call-in to document a visit in Sandata EVV, in instances when a visit took place but the employee did not call-in or call-out.

From the Visit Maintenance > Manage Visits screen

1. Click **CREATE CALL**.



Visit Maintenance / Visit Maintenance / Manage Visits

Account: 6002 - @sandata.com Enter agency [dropdown] LOG OUT

Select a Visit

DATE RANGE MM/DD/YYYY: 04/08/2019 to 04/08/2019

CLIENT: Enter Client

EMPLOYEE: Enter Employee

CATEGORY: Select Category

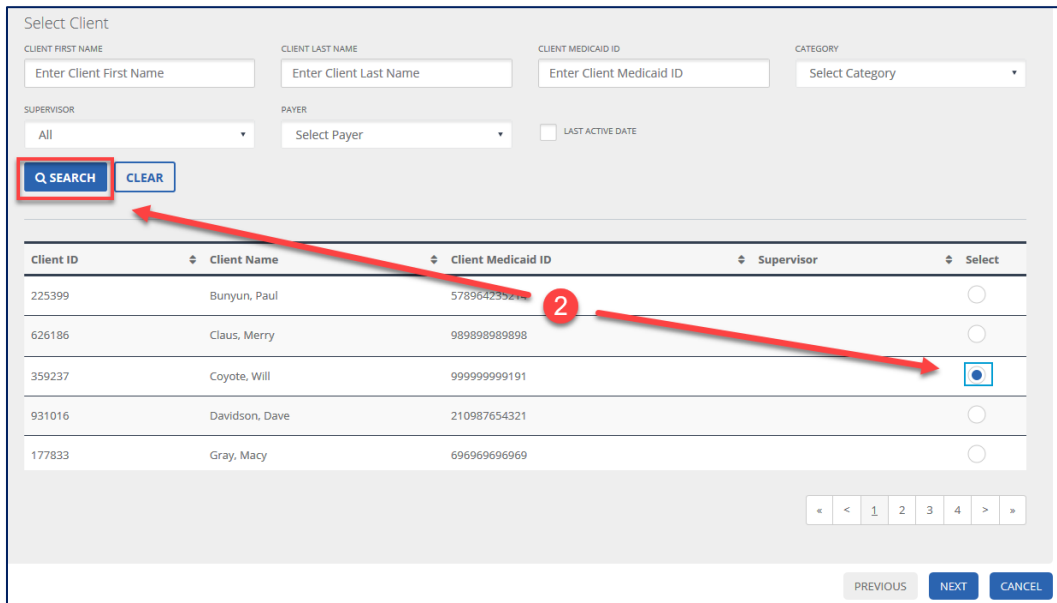
PAYER: Select Payer

VISIT STATUS: Select Visit Status

CLIENT MEDICAID ID: Enter Client Medicaid ID

CREATE CALL

2. Search for and select a client.



Select Client

CLIENT FIRST NAME: Enter Client First Name

CLIENT LAST NAME: Enter Client Last Name

CLIENT MEDICAID ID: Enter Client Medicaid ID

CATEGORY: Select Category

SUPERVISOR: All

PAYER: Select Payer

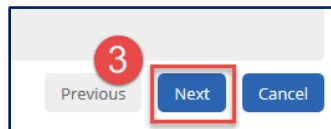
LAST ACTIVE DATE:

SEARCH CLEAR

Client ID	Client Name	Client Medicaid ID	Supervisor	Select
225399	Bunyun, Paul	57896429321		<input type="radio"/>
626186	Claus, Merry	989898989898		<input type="radio"/>
359237	Coyote, Will	999999999191		<input checked="" type="radio"/>
931016	Davidson, Dave	210987654321		<input type="radio"/>
177833	Gray, Macy	696969696969		<input type="radio"/>

PREVIOUS NEXT CANCEL

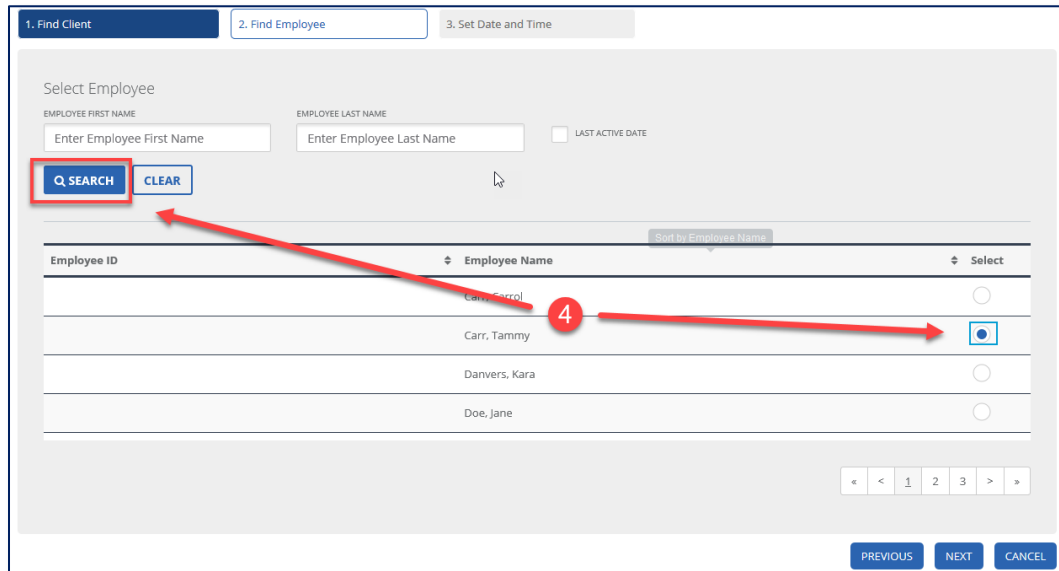
3. Click **Next**.



3

Previous **Next** Cancel

4. Search for and select an employee.



Select Employee

EMPLOYEE FIRST NAME: Enter Employee First Name

EMPLOYEE LAST NAME: Enter Employee Last Name

LAST ACTIVE DATE:

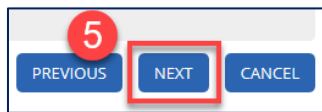
Q SEARCH CLEAR

Sort by Employee Name

Employee ID	Employee Name	Select
	Carr, Carol	<input type="radio"/>
	Carr, Tammy	<input checked="" type="radio"/>
	Danvers, Kara	<input type="radio"/>
	Doe, Jane	<input type="radio"/>

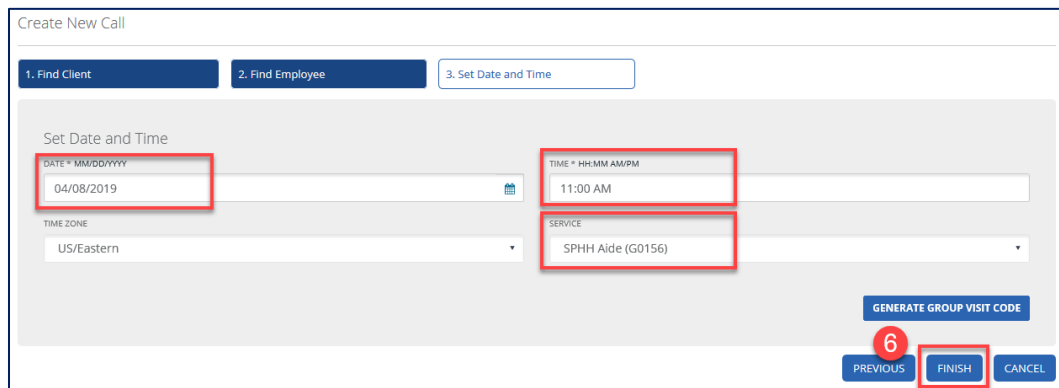
PREVIOUS NEXT CANCEL

5. Click **Next**.



PREVIOUS **NEXT** CANCEL

6. Select the date, time and service (based on Payer from client record) for the visit and click **FINISH**.



Create New Call

1. Find Client 2. Find Employee 3. Set Date and Time

Set Date and Time

DATE * MM/DD/YYYY: 04/08/2019

TIME * HH:MM AM/PM: 11:00 AM

TIME ZONE: US/Eastern

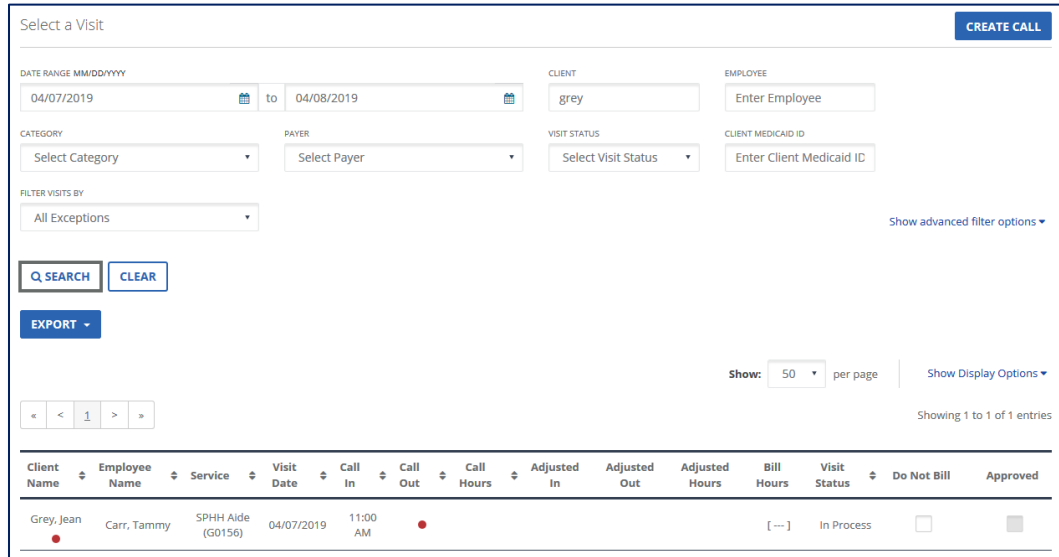
SERVICE: SPHH Aide (G0156)

GENERATE GROUP VISIT CODE

PREVIOUS **FINISH** CANCEL

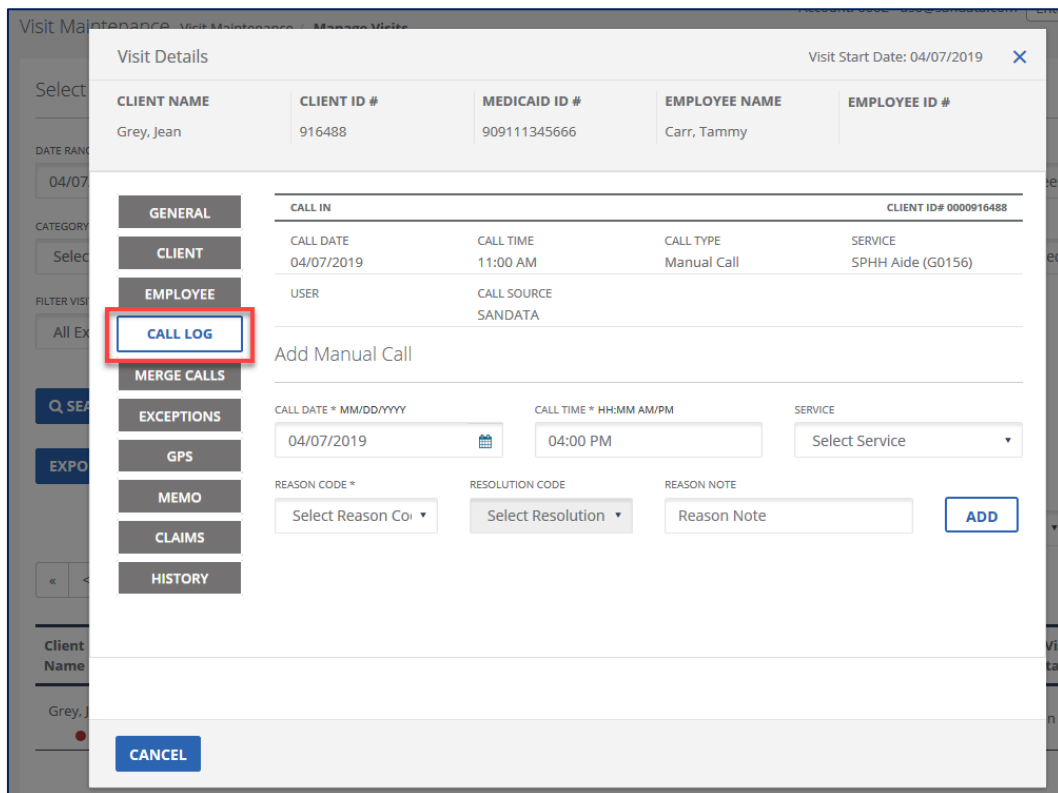
7. Click **OK** to save changes.

8. Search for your newly created call using the Visit Maintenance filters.



Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Bill Hours	Visit Status	Do Not Bill	Approved
Grey, Jean	Carr, Tammy	SPHH Aide (G0156)	04/07/2019	11:00 AM							In Process	<input type="checkbox"/>	<input type="checkbox"/>

9. Click on the visit record to display the *Visit Details* screen and go to the **CALL LOG** screen to add a call-out.



Visit Start Date: 04/07/2019

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grey, Jean	916488	909111345666	Carr, Tammy	

CALL IN	CLIENT ID# 0000916488		
CALL DATE	CALL TIME	CALL TYPE	SERVICE
04/07/2019	11:00 AM	Manual Call	SPHH Aide (G0156)
USER	CALL SOURCE		
	SANDATA		

Add Manual Call

CALL DATE * MM/DD/YYYY: 04/07/2019

CALL TIME * HH:MM AM/PM: 04:00 PM

SERVICE: Select Service

REASON CODE *: Select Reason Code

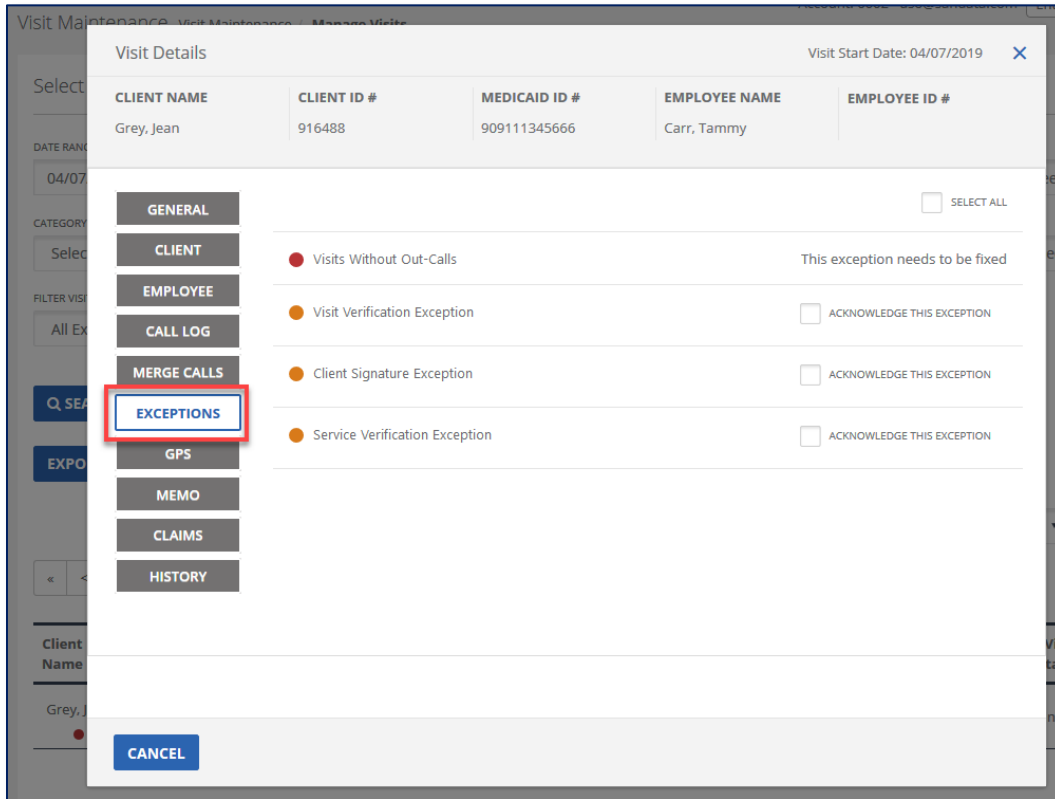
RESOLUTION CODE: Select Resolution

REASON NOTE: Reason Note

ADD

CANCEL

4. Click the **EXCEPTIONS** screen to review and clear the exceptions for the visit. (Exceptions will vary based on the client's specified payer)



Visit Details Visit Start Date: 04/07/2019 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grey, Jean	916488	909111345666	Carr, Tammy	

SELECT ALL

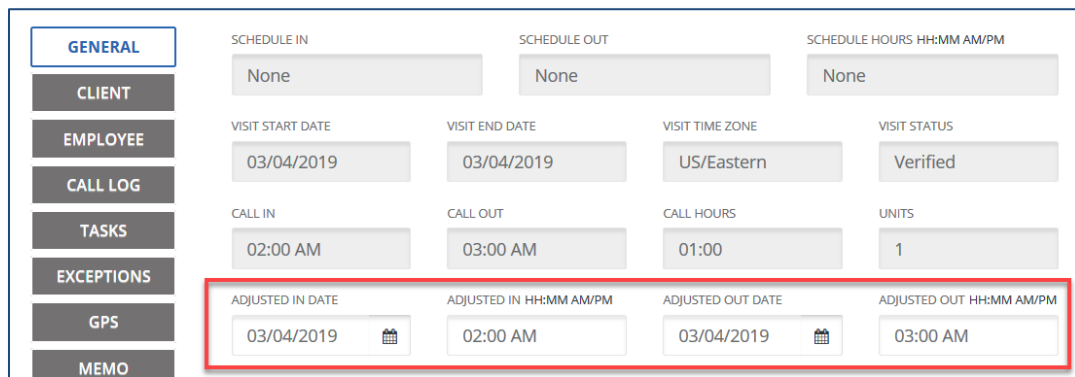
- Visits Without Out-Calls This exception needs to be fixed
- Visit Verification Exception ACKNOWLEDGE THIS EXCEPTION
- Client Signature Exception ACKNOWLEDGE THIS EXCEPTION
- Service Verification Exception ACKNOWLEDGE THIS EXCEPTION



EXCEPTIONS (highlighted in red box)

CANCEL

Entering Adjusted Times

If the call times for a visit do not reflect the actual start and/or end times of an employee’s visit (i.e. the employee had to do something for the client immediately upon arriving and could not call-in or the client was using the telephone), a user can enter an **ADJUSTED IN** and/or **ADJUSTED OUT** on the General screen to update the visit duration. Sandata EVV will add the adjusted time entered and actual call time to recalculate the visit duration.



GENERAL	SCHEDULE IN	SCHEDULE OUT	SCHEDULE HOURS HH:MM AM/PM	
CLIENT	None	None	None	
EMPLOYEE	VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
CALL LOG	03/04/2019	03/04/2019	US/Eastern	Verified
TASKS	CALL IN	CALL OUT	CALL HOURS	UNITS
EXCEPTIONS	02:00 AM	03:00 AM	01:00	1
GPS	ADJUSTED IN DATE	ADJUSTED IN HH:MM AM/PM	ADJUSTED OUT DATE	ADJUSTED OUT HH:MM AM/PM
MEMO	03/04/2019 	02:00 AM	03/04/2019 	03:00 AM

From the *Visit Details* screen:

1. Click **GENERAL**.
2. Enter the appropriate information into the Adjusted Date(s) and/or Time(s) fields.
3. Select the **REASON CODE, RESOLUTION CODE, SERVICE** and **REASON NOTE**, if needed.
4. Click **ADD**.

8 Reports

Module Time

20 minutes

This lesson demonstrates how to generate Sandata EVV reports. At the end of the lesson there are report descriptions.

Module Objectives

After completing this lesson, you will be able to:

- access reports;
- use Daily and Date Range reports; and
- sort and filter reports.

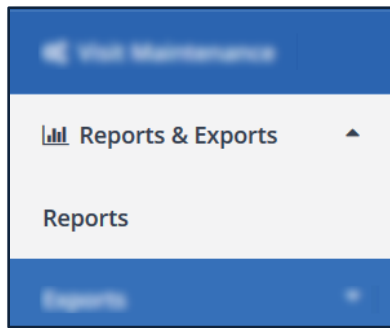
Introduction

There are multiple reports available within Sandata EVV. Different users may have access to different reports. When reports are generated, they can either be saved as a portable document file (.pdf), Excel (.xls) or a comma delimited file (.csv).

There are multiple filters that enable the user to retrieve only the data they want to see.

Access Reports

1. Click **Reports & Exports>Reports** on the *Navigation* panel.



Reports – Main Window Elements

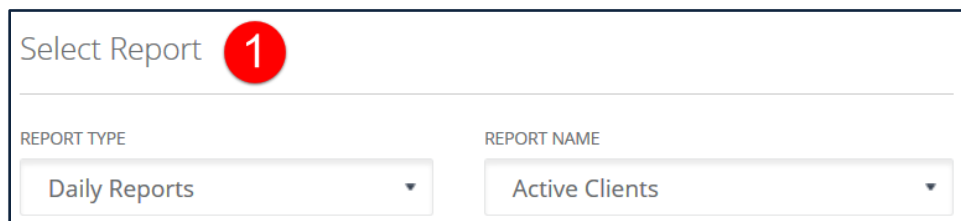
1. **Select Report**

Select the **REPORT TYPE** and **REPORT NAME** of the report being run.



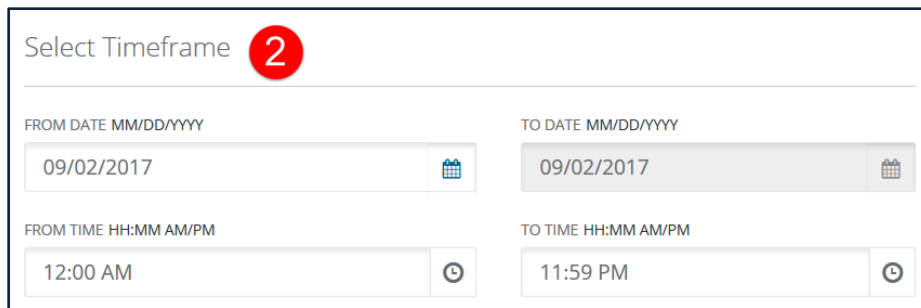
The reports listed in the **REPORT NAME** field change based on the **REPORT TYPE** category selected.

- **Daily:** These reports display results for a selected single date
- **Date Range:** These reports display results for a selected date range

A screenshot of a web form titled 'Select Report'. A red circle with the number '1' is next to the title. Below the title, there are two dropdown menus. The first is labeled 'REPORT TYPE' and has 'Daily Reports' selected. The second is labeled 'REPORT NAME' and has 'Active Clients' selected.

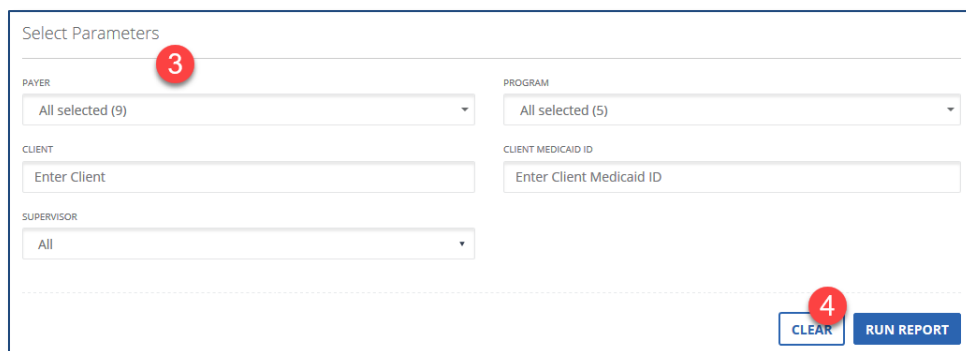
2. Select Timeframe Select the time and/or date range of the reports being run.

Filter	Description
FROM DATE	Enter the beginning date of the date range
TO DATE	Enter the ending date of the date range
FROM TIME	Enter the beginning time of the timeframe
TO TIME	Enter the ending time of the timeframe



3. Select Parameters Various search options are made available for the user to further limit the report results. Depending on the report selected, the parameters can differ. Common filters include, but are not limited to:

Filter	Description
PAYER	List of Payers and MCOs
PROGRAM	List of programs
CLIENT	Search for the client by last name or client ID
CLIENT MEDICAID ID	Enter the client’s Medicaid ID number



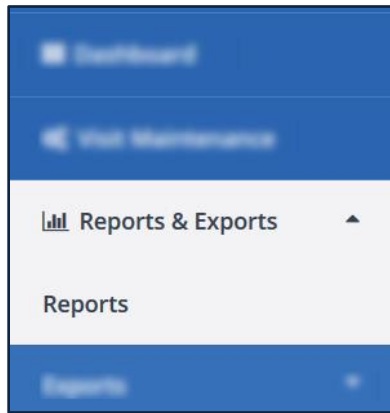
4. Run Report Runs the report based upon the selected criteria.

Running a report

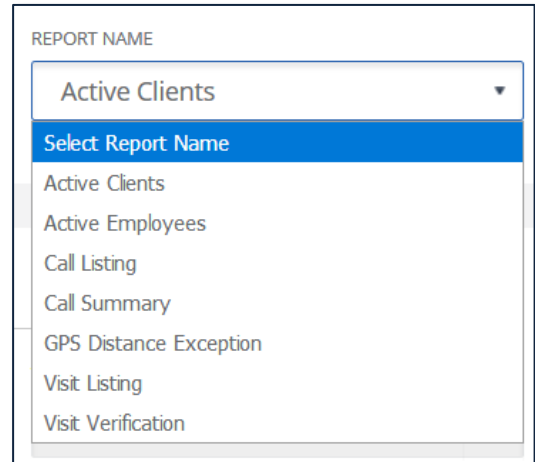
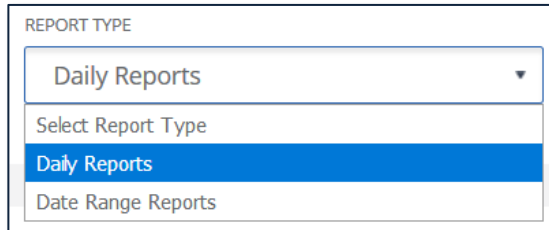


Follow along with the instructor to run a report.

1. Click **Reports & Exports>Reports** from the *Navigation* panel. The *Reports* screen displays.



2. Select the **REPORT TYPE** and **REPORT NAME**.



Available reports differ depending upon which report type is selected.

3. Enter **Select Timeframe** information.

Select Timeframe

FROM DATE MM/DD/YYYY TO DATE MM/DD/YYYY

04/14/2019 04/14/2019

FROM TIME HH:MM AM/PM TO TIME HH:MM AM/PM

12:00 AM 11:59 PM



For *Daily* reports, the default is always the current day's date. For *Date Range* reports, the default is the past two (2) weeks. Both types of reports can be filtered further by entering time constraints.

Maximum date range is 730 days.

4. Set the desired search **Parameters**. When a parameter field shows "select" you must choose a value(s) before running the report.

Select Parameters

PAYER EXCEPTION

All selected (9) Select Exception

PROGRAM SERVICE

All selected (5) All selected (21)



The **SUPERVISOR** field is not necessary to run the report. Entering a **CLIENT** or **CLIENT MEDICAID ID** narrows the results to just that client.



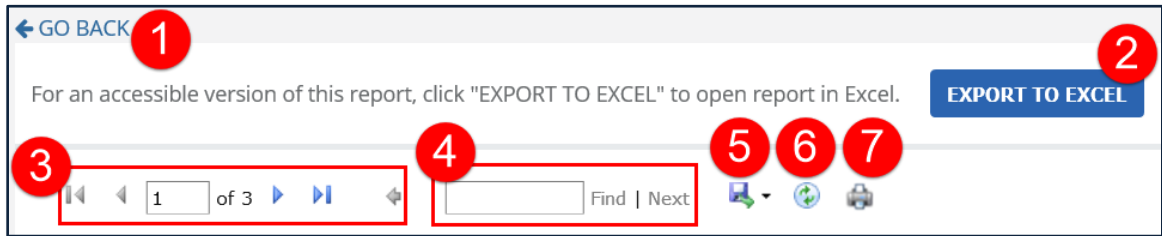
Parameters vary based on the report selected.

To reduce the size of the report and ensure efficiency when running reports with longer date ranges or containing lots of data, it is best to select other parameters such as: **CLIENT** or **CLIENT MEDICAID ID**.

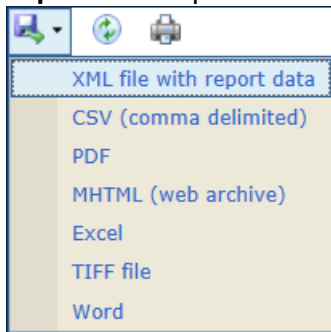
5. Click **Run Report**. The *Preview Report* screen opens.



Navigating a Report



1. **Go Back:** This links closes the *Preview Report* screen and re-displays the report search parameters.
2. **EXPORT TO EXCEL:** This button produces an accessible version of the report in Microsoft Excel.
3. **Page Navigation:** This section will display the current page vs. the total number of pages. Navigate to a specific page by typing a number into the current page field and pressing **<Enter>**. The arrows can be used to navigate to the first, next, previous and last page.
4. **Search Functionality:** Allows you to find data on any page in the report. The **Next** button jumps to the next instance of the search criteria within the document.
5. **Export:** The report can be exported into several formats:



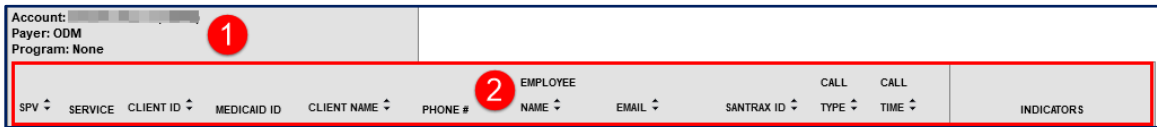
If all report data is to be in a single table, export as CSV (comma delimited) and open in MS Excel.

6. **Refresh:** Re-runs the report and renews the displayed data.
7. **Print:** Use this button to print the report.




The print icon is not available in the tool bar for Firefox and Chrome users. Firefox and Chrome users should export the report to PDF and use the PDF print tools.



Sorting a Report



1. **Report Grouping Tab:** This tab displays general information pertaining to the report as well as the sections for grouped reports.
2. **Column Header:** Clicking a column's header will sort the results in either ascending or descending order based on that column's content.



If the column header has no arrow () next to it, the column cannot be sorted.

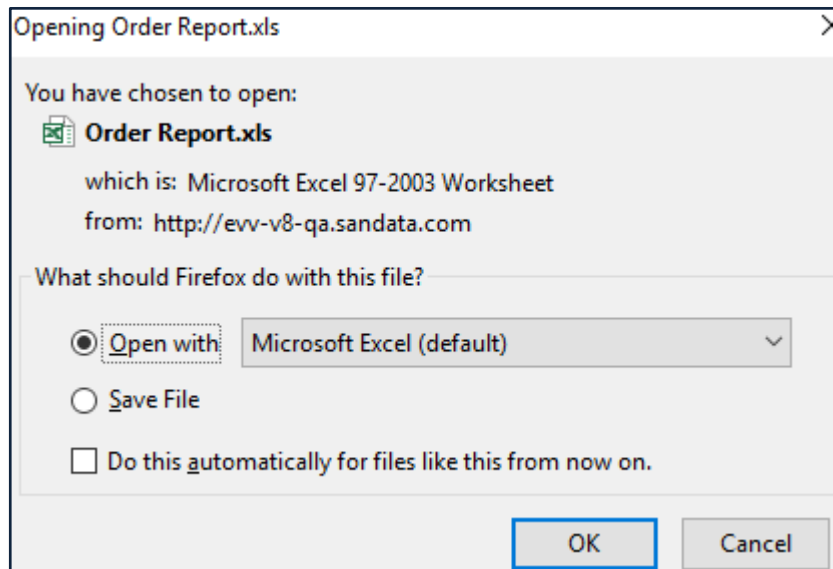
When a column is sorted, a visual indicator ( / ) reveals which column and in which order it is sorted.

Export a Report

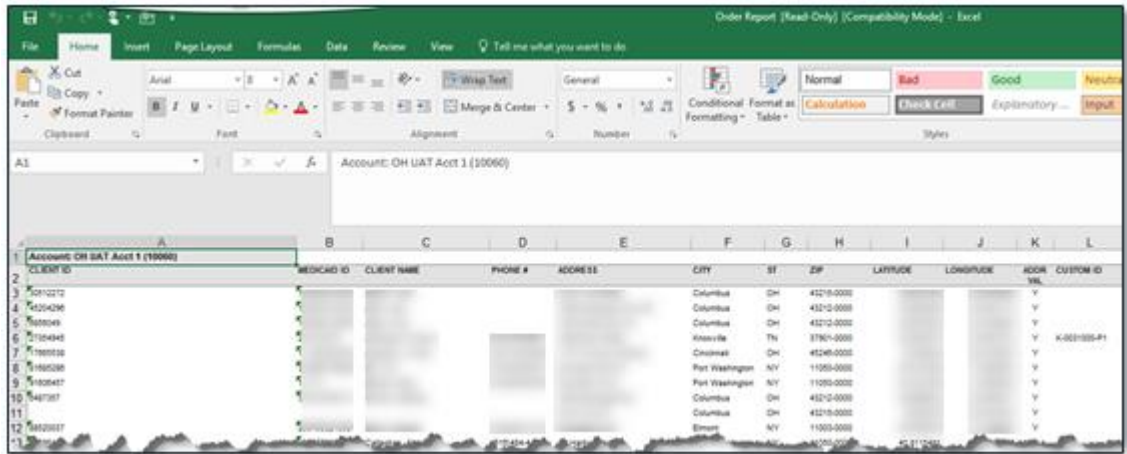


Follow along with the instructor to export a report.

1. Click **EXPORT TO EXCEL**. The *Opening Order Report.xls* dialog box opens.



- Click **OK** to export the file. The report opens in Microsoft Excel.



On Your Own: Run the Client Summary Report

Sample Available Reports

Role and security level determine the reports available. The reports support monitoring of visits in the field to ensure that clients are receiving the services as required. The reports also help put together the missing pieces in Visit Maintenance.

Daily Reports

1. **Active Client Report:** This report lists all active clients as of the date selected.



Use this report to view all client’s phone numbers, active addresses, identify whether or not an address was verified by GPS, the client’s Medicaid ID (for SMC). Client ID (for TVV) and the Client Alternate ID if available.

ACTIVE CLIENTS										
Report Parameters										
Account: 9634										
For: 3/7/2019 - 3/7/2019 11:59:59 PM										
Account: Provider Training-Agency 39 (9634)										
CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	ADDRESS	CITY	ST	ZIP	LATITUDE	LONGITUDE	CLIENT ALTERNATE ID
					Whitehall	OH	43213-0000	39.959479	-82.88787490	
					Columbus	OH	43219-0000	39.99078480000001	-82.94719529999999	

2. **Active Employees Report:** This report displays all active employees for the selected date. The report displays the employee ID, employee name, employee email address, phone number and Santrax ID.



Use this report to view current employee information and review the employee email address (for SMC) and employee Santrax ID (for TVV).

ACTIVE EMPLOYEES						
Report Parameters						
Account: OHIO QA Template Agency 1 (10010)						
For: 3/4/2019 12:00:00 PM - 3/4/2019 12:00:59 PM						
Account: OHIO QA Template Agency 1 (10010)						
EMPLOYEE ID	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE SANTRAX ID	PHONE #	DEP	
				-	-	
				-	-	
				-	-	
				-	-	

3. **Call Listing Report:** This report displays all call activity from all available call methods for the selected day and time range specified. The calls are listed one after another individually with the beginning pages listing calls with missing data.



Use this report to review call activity for the day and time selected. This report allows users to monitor trends in call activity and identify call that require editing, verification or exception handling.

Call Listing												Report Parameters	
Account: OHIO QA Template Agency 1 (10010) Payer: ODM Program: SP												Account: 10010 For: 3/7/2019 - 3/7/2019 11:59:59 PM	
SPV	SERVICE	CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE SANTRAX ID	CALL TYPE	CALL TIME	GROUP VISIT CODE	INDICATORS	
									MANUAL	01:00 AM			#
									MANUAL	03:00 AM			#
									IVR	04:57 AM			#
									MVV	04:56 AM	328781		#
									MVV	05:03 AM	328781		#

4. **Call Summary Report:** This report pairs the Start and End calls and calculates the hours worked.



Use this report to review current visit information on a daily basis and identify the incomplete visits from the previous day that need correction or follow up. This report allows users to monitor trends in call activity and exception handling.

Call Summary												Report Parameters			
ACCOUNT: OHIO QA Template Agency 1 (10010) PAYER: None PROGRAM: OHC												Account: 10010 OHIO QA Template Agency 1 For: 3/7/2019 - 3/7/2019 11:59:59 PM			
SERVICE	CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE SANTRAX ID	START	END	CALLS HOURS	BILL HOURS	UNITS			
								07:09 AM	07:21 AM	00:12	00:12	0.20			
								10:32 AM							
								10:25 AM							
								08:06 AM							
								04:57 AM	05:03 AM	00:06	00:06	0.10			
Total of Bill Hours: 00:18												Total of Completed Visits: 2		Total of Visits: 8	

- 5. **GPS Distance Exception Report:** This report shows mobile calls that were made from a location that does not match to an active client’s address.



Use this report to review calls that were made outside of the expected distance tolerance from a client address. The report captures the client, employee, visit date, call time, service and closest client address.

GPS Distance Exception										Report Parameters
ACCOUNT: Agency 1 Train the Trainer (6002) PAYER: Buckeye PROGRAM: SP										Account: 6002 For: 4/3/2019 - 4/3/2019 11:59:59 PM
CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	EMPLOYEE ID	EMPLOYEE NAME	EMPLOYEE EMAIL	ACTUAL CALL DATE	ACTUAL CALL TIME	SERVICE	DISTANCE (FT)	CLOSEST CLIENT ADDRESS
931016	Davidson, Dave	210987654321		Doe, Jane	JANE@MAILINATOR.COM	04/03/2019	01:57 PM	G0300_SP	28	[Redacted]
931016	Davidson, Dave	210987654321		Doe, Jane	JANE@MAILINATOR.COM	04/03/2019	01:58 PM	G0300_SP	29	[Redacted]
931016	Davidson, Dave	210987654321		Doe, Jane	JANE@MAILINATOR.COM	04/03/2019	02:56 PM	G0300_SP	35	[Redacted]
931016	Davidson, Dave	210987654321		Doe, Jane	JANE@MAILINATOR.COM	04/03/2019	02:57 PM	G0300_SP	34	[Redacted]
931016	Davidson, Dave	210987654321		Doe, Jane	JANE@MAILINATOR.COM	04/03/2019	03:56 PM	G0300_SP	35	[Redacted]
Sub Total # of Visits		5								

Page 3 of 8

- 6. **Visit Verification Report:** This report provides information for visits on a given date. Reported information for each visit includes actual calls, adjusted times and client verification information.



Use this report to view all information about a visit.

Visit Verification													Report Parameters							
Account: OHIO QA Template Agency 1 (10010) Payer: None Program: OHC Service: 55125													Account: 10010 - OHIO QA Template Agency 1 For: 2/21/2019							
CLIENT MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	EMPLOYEE SANTRAX ID	VISIT DATE	SCHEDULED			ACTUAL			ADJUSTED			BILL			CLIENT VERIFIED		
						START	END	HOURS	START	END	HOURS	START	END	HOURS	HOURS	SERVICE	TIME	SIGNATURE		
					02/21/2019				06:00 AM	05:22 AM	23:22				23:22	No	No	No		
					02/21/2019				09:39 AM							No	No	No		
					02/21/2019				10:34 AM							No	No	No		
					02/21/2019				10:47 AM							No	No	No		
					02/21/2019				10:52 AM							No	No	No		
		*****9777			02/21/2019				08:01 PM							Yes	Yes	Yes		

Date Range Reports

These reports should be run after Visit Maintenance is completed. The corrections made in Visit Maintenance are reflected in these reports.

1. **Client Visit Summary:** This report shows all visits for the selected date range sorted by client, with each client on its own page. Results are sorted per visit, per service. The report includes basic information such as: visit date, employee Santrax ID, employee email, employee name, visit date, number of visits and visit hours.



Use this report to review visit hours and information by client. It is a useful tool to review what service were provided to a client for a given time. It also assists in monitoring trends in the services clients are receiving.

Client Visit Summary								
								Report Parameters
								Account: 10010 For: 3/7/2019 - 3/7/2019 11:5
Account: OHIO QA Template Agency 1 (10010) Payer: ODM SPV: None Client ID: [REDACTED] Client Medicaid ID: [REDACTED] Client Name: [REDACTED]								
PROGRAM	SERVICE	EMPLOYEE SANTRAX ID	EMPLOYEE EMAIL	EMPLOYEE NAME	VISIT DATE	# OF VISITS	HOURS	
OHC					03/07/19		02:00	
Client Totals:						1	02:00	
Grand Totals:						1	02:00	

2. **Detail Visit Status Report:** This report is a detailed view of all visits based on the selected date range and parameters. The report groups the client and employee information pertaining to the visit with the visit details such as, exceptions, services, date, time and the actual/adjusted call-in and call-out times.



Use this report to review a detailed overview of all visits within a selected date range. It assists in easily identifying visits that have statuses that need to be corrected. The report can also be printed based on exceptions or visits that need exception handling in order to get them to a verified status for claims validation.

Report Parameters
Account: 10010 - OHIO QA Template Agency 1
For: 3/7/2019 - 3/7/2019 11:59:59 PM
Visit Status: All

Detail Visit Status

ACCOUNT: OHIO QA Template Agency 1 (10010)
PRFR: None
PROGRAM: None
SPG: None
STATUS: In Process

VISIT ID	CLIENT MEDICAD ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	SERVICE	GROUP VISIT CODE	VISIT DATE	SCHEDULED		CALL		ADJUSTED		UNRESOLVED EXCEPTIONS
								START	END	START	END	START	END	
1873352524							03/07/2019			01:00 AM				Client Signature Exception, Missing Service, Visit Verification Exception, Visits Without Out-Calls
1873329904							03/07/2019			01:00 AM				Client Signature Exception, Missing Service, Visit Verification Exception, Visits Without Out-Calls
1873356138							03/07/2019			01:00 AM				Client Signature Exception, Missing Service, Visit Verification Exception, Visits Without Out-Calls
Sub Total # of Visits: 4														

Sandata 3/7/2019 3:07:00 PM Page 1 of 19

3. **Summary Visit Status Report:** This report is a summary view of the status of all visits based on the selected date range and parameters. The results are grouped by the duration of time each visit has remained in the same status. It shows visits in a 31 day or monthly range.



Use this report to review the status of all visits within a selected date range at a summary level. The report provides an easy way to quickly identify those visits requiring exception handling. When visits are identified, users can run a more detailed report for that specific visit to identify and correct exceptions.

Report Parameters
Account: 10010 - OHIO QA
For: 3/6/2019 - 3/6/2019 1

Summary Visit Status

ACCOUNT: OHIO QA Template Agency 1 (10010)
PRFR: ODM
PROGRAM: OHC

STATUS	AGE					TOTAL #
	<1 DAYS	1 - 5 DAYS	6 - 10 DAYS	11 - 15 DAYS	16 - 31 DAYS	
In Process	0	0	0	0	0	0
Incomplete	8	0	0	0	0	8
Verified	2	0	0	0	0	2
Processed	0	0	0	0	0	0
Omit	0	0	0	0	0	0
TOTAL #	10	0	0	0	0	10

4. **Visit Log Report:** All visits associated with each client within the selected date range are listed with one client per page in this report.



Use this report to track your client's visits by monitoring call times, bill information and reason codes applied.

Visit Log														Report Parameters			
ACCOUNT OHIO QA Template Agency 1 (10010) PAYER: None CLIENT NAME: [REDACTED] PHONE #: (****)-9777 CLIENT MEDICAID ID: Unknown														Account #: 10010 Account Name: OHIO QA Template Agency For: 2/21/2019 - 3/7/2019 11:59:59 PM			
PROGRAM	SERVICE	SPV	PRIORITY	EMPLOYEE NAME	VISIT DATE	SCHEDULE	START	END	HOURS	CALL	START	END	ACTUAL	ADJUSTED	BILL	RATE	REASON CODES
OHC	86125			[REDACTED]	Thu 02/21					📞 08:01 PM							
OHC	86125			[REDACTED]	Thu 02/21					📞 07:50 PM	📞 08:05 PM		00:15		00:15		10
SP	G0300			[REDACTED]	Thu 02/21					📞 11:04 AM							
OHC	86125			[REDACTED]	Thu 02/21					📞 07:27 PM	📞 07:37 PM		00:10		00:10		10
SP	T1001			[REDACTED]	Thu 02/21					📞 10:53 AM							

- 5. Visit Verification Activity Summary Report:** This report contains a list of modifications for each visit. Only the modified visits are included in this report and the report is sorted by the user who performed the Visit Maintenance.



Use this report to review visit modifications. It includes what change was made, who made the change, when and why the change was made and the reason code related to the change.

Visit Verification Activity Summary														Report Parameters				
Account: OHIO QA Template Agency 1 (10010) Payer: None Program: SP														Account: 10010 For: 2/21/2019 - 2/21/2019 11:59:59 PM				
CLIENT MEDICAID ID	CLIENT NAME	EMPLOYEE NAME	EMPLOYEE SAMTRAX ID	SERVICE	GROUP VISIT CODE	VISIT DATE	SCHEDULED	START	END	HOURS	ACTUAL	START	END	HOURS	ADJUSTED	BILL	REASON	
Visit - Assign Call to Visit - VU.VO@SANDATA.COM - 2/22/2019 08:06 PM						Thu 02/21					📞 07:35 PM	📞 07:45 PM		00:10		00:10	0.17	10 N
Visit - Add Visit - - 2/22/2019 08:07 PM						Thu 02/21					📞	📞 07:07 PM				0.75	N	
Visit - Assign Call to Visit - VU.VO@SANDATA.COM - 2/22/2019 08:07 PM						Thu 02/21					📞 07:07 PM	📞 07:52 PM		00:45		00:45	0.75	10 N
Visit - Add Visit - - 2/22/2019 08:05 PM						Thu 02/21					📞 07:35 PM	📞				0.17	N	
Total Visit Updates: 4																		

6. **Visit Verification Exception Report:** This report details the various exceptions found in Visit Maintenance and lists each exception type page by page with all applicable visits. Example: GPS Distance Exception.



Use this report to review the visit verification information and activity for a date range. It lists currently applied exceptions.




Visits with multiple exceptions appear on multiple pages.

Report Parameters
 Account: [REDACTED]
 For: 9/28/2017 - 10/12/2017 11:59:59 PM

Visit Verification Exception

Account: [REDACTED]
 Payer: [REDACTED]
 Program: [REDACTED]
 Service: [REDACTED]
 Exception Type: Client Signature Exception

SPV	MEDICAID ID	CLIENT	EMPLOYEE	VISIT DATE	ACTUAL			ADJUSTED			BILLED HOURS	REASON			
					START	END	HOURS	START	END	HOURS		CODES	TASKS	EX	
			123456	Mon 10/06		08:27 AM									
				Fri 10/06		11:29 AM									
				Fri 10/06		11:52 AM									
					Total of Actual Hours: N/A										
					Total of Adjusted Hours: N/A										
					Total of Billed Hours: N/A										
					Total of Visits: 3										

 Sandata
10/12/2017 8:20:29 AM
Page 1 of 23

1. **Visit Claims Verification Status Report:** This report lists all visits within selected date range regardless of the visit's status and shows the last time each visit was returned to the payer for validation.



Use this report to track what visits have been matched to the claim for a visit or the remaining balance to reconcile outstanding claims.

Visits Claims Verification Status												
											Report Parameters	
											Account: [REDACTED]	
											For: 9/28/2017 - 10/12/2017 11:59:59 PM	
											Visit Status: In	
											Process: Incomplete, Verified, Processed, Omit	
											Sub Total # of Visits: 20	
											Total # of Visits: 20	
Account: [REDACTED]	Provider Medicaid ID: [REDACTED]											
Payer	Program	Service	HCPCS	Client Name	Medicaid ID	Visit Date	Start	End	Visit Status	Batch ID	Transaction ID	Visit Verified Date
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/02/2017	11:42 AM	11:44 AM	Verified			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017	08:24 AM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017		08:25 AM	Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/08/2017	03:32 PM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017		08:27 AM	Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017		08:29 AM	Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017		08:47 AM	Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	09/28/2017	05:16 PM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/06/2017	11:29 AM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017	08:46 AM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/03/2017	12:00 PM	12:19 PM	Verified			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/06/2017	03:30 PM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	09/28/2017	04:59 PM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/02/2017	11:33 AM	11:35 AM	Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/02/2017	11:37 AM	11:39 AM	Verified			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017	08:55 AM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	09/28/2017	04:59 PM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/09/2017	08:23 AM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	09/28/2017	05:16 PM		Incomplete			
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	10/06/2017	11:52 AM		Incomplete			

9 Group Visits

Module Time

60 minutes

This lesson demonstrates how to utilize the Group Visit functionality in SMC, TVV and EVV to capture visits when one or more employees are providing to one or more clients at the same time.

Module Objectives

After completing this lesson, you will be able to:

- start, join and end a group visit using SMC;
- start, join and end a group visit using TVV;
- search for group visits in EVV Visit Maintenance;
- create a group visit call in EVV Visit Maintenance; and
- edit/enter a group visit code for a visit.

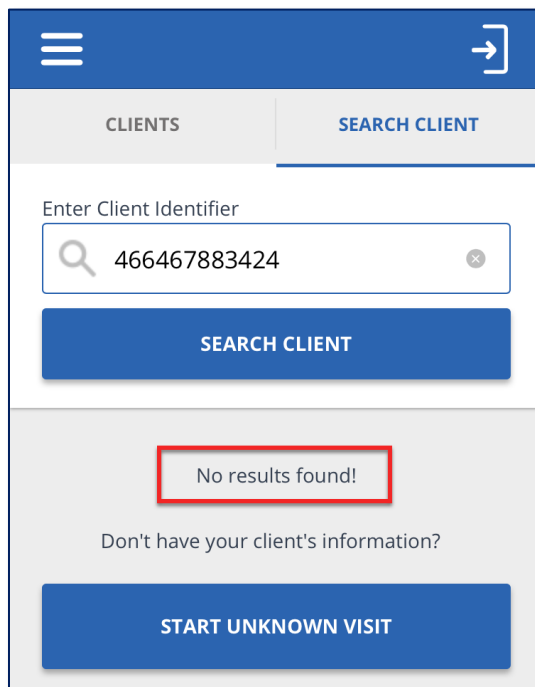
The Group Visit option allows one employee to call-in and call-out for one or more client visits at the same time, or multiple employees to call-in and call-out for one or more client visits at the same time. Group visits can be captured via SMC, TVV and EVV Visit Maintenance.

Sandata Mobile Connect (SMC)

Starting a new Group Visit

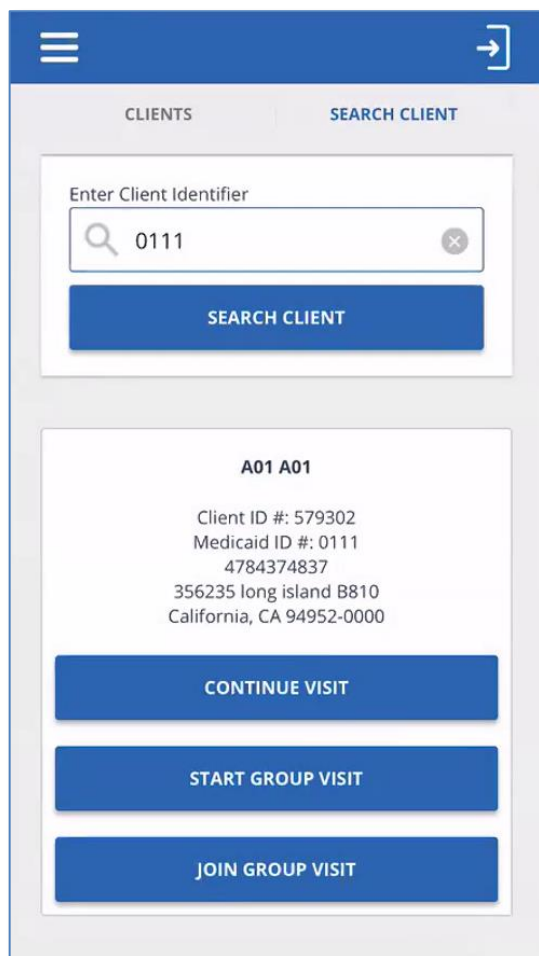
When the employee arrives to provide care to the client(s), he or she will:

1. Locate the EVV Device or the employee’s personal device.
2. Log in to SMC.
3. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID or the system generated client ID of the client.
4. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any client, a “No results found” message displays).

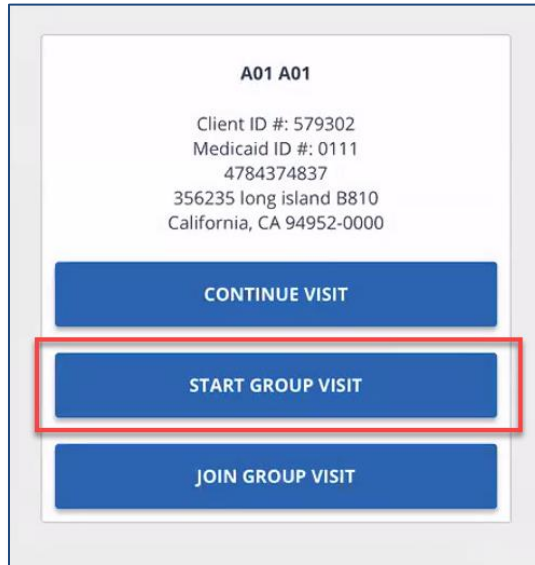


When the client details display, there are options to **CONTINUE VISIT**, **START GROUP VISIT** or **JOIN GROUP VISIT**.

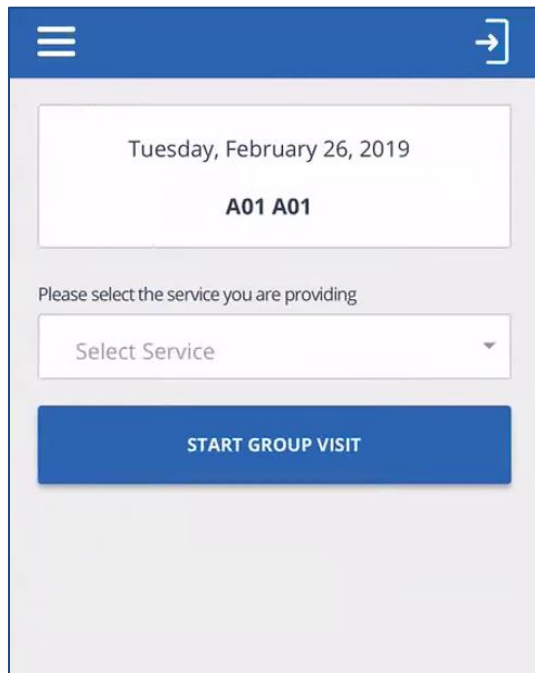
- **CONTINUE VISIT:** this option allows the employee to start a single client visit.
- **START GROUP VISIT:** this option allows an employee to start a new group visit and add clients to the group visit.
- **JOIN GROUP VISIT:** this option allows an employee to join an existing group visit started by another employee who is also providing care at the same location. The employee can add their clients to that group.



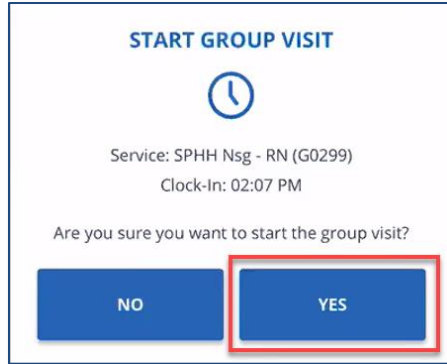
5. Tap **START GROUP VISIT**.



6. Select the appropriate Service from the drop-down list then tap **START GROUP VISIT**.



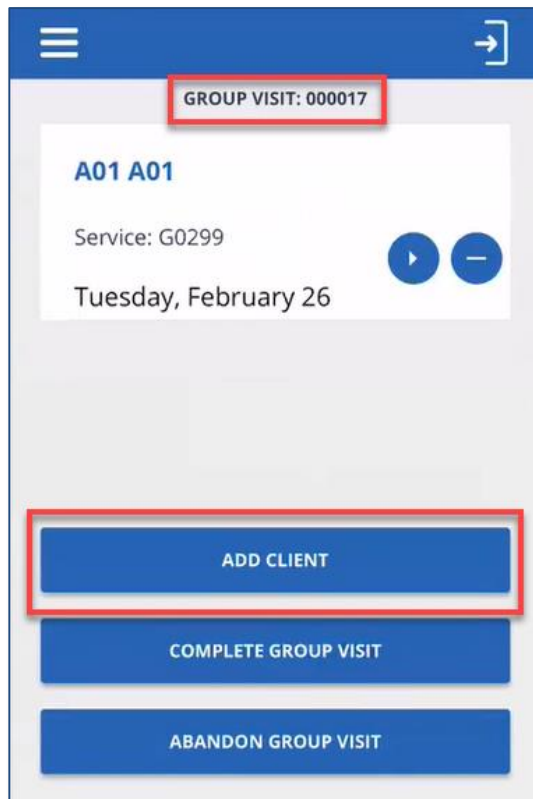
7. A confirmation screen displays asking the employee to confirm the start of the group visit. Tap **YES**.



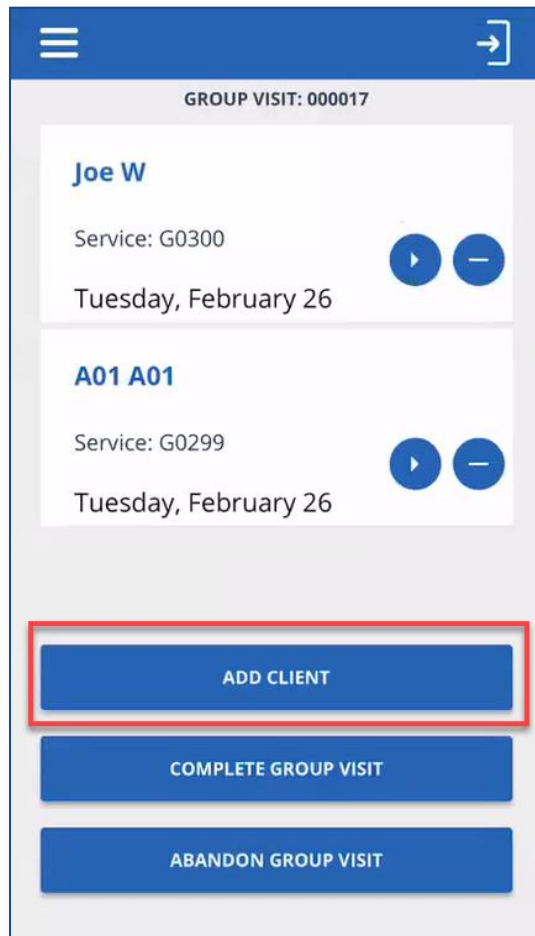
The visit is in progress and a Group Visit code is generated. This 6-digit code is used to identify all clients at a location who are receiving care from one or more employees from the same provider agency.

The employee may add additional clients they are providing care for to the group visit.

The employee may also give the Group Visit code to other employees arriving to provide care to the same clients or different clients at the location. Group visit codes are only valid for use within a provider agency.



8. Tap **ADD CLIENT** to search for additional clients to add to the group. Once added, the clients will appear on the Group Visit screen.



An employee will only see the clients he or she added to the group visit, even if other employees join the group and add clients.



There is no limit to the number of known clients an employee can add to a group visit, or the number of employees who can join a group visit. However, an employee can only add one unknown client to a group visit.

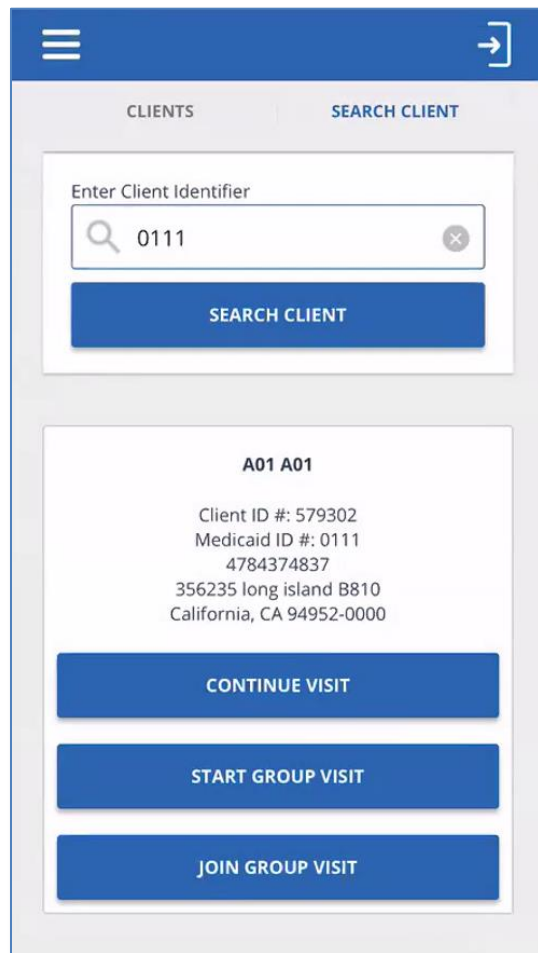


A group visit code is only valid for a maximum of 24 hours. Within the 24 hour period, once the last visit in group ends, the code is closed. The same code cannot be re-generated within 72 hours.

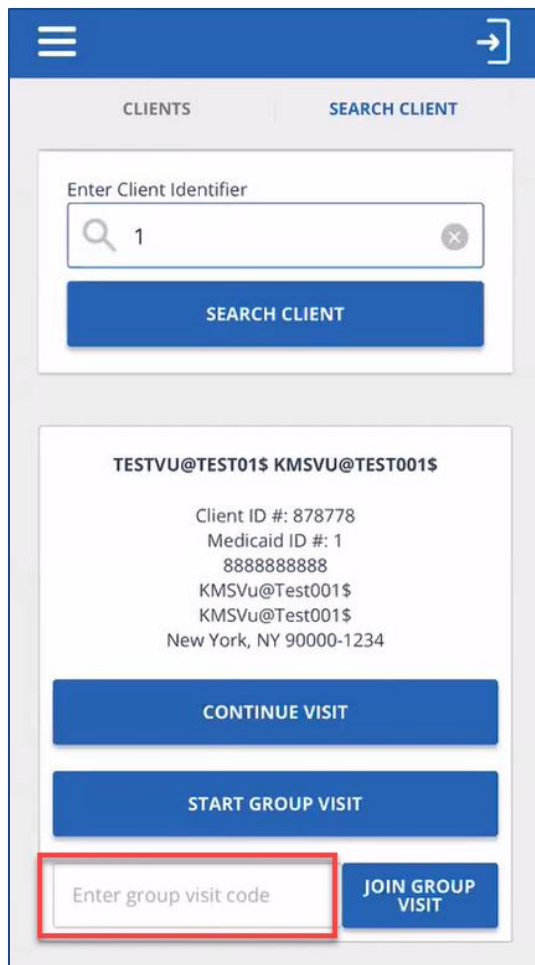
Joining a Group Visit

If an employee needs to join an existing group visit upon arriving at a location, the employee will:

1. Locate the EVV Device or the employee’s personal device.
2. Log in to SMC.
3. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID of the client.
4. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any client, a “No results found” message displays).
5. When the client details display, tap **JOIN GROUP VISIT**.

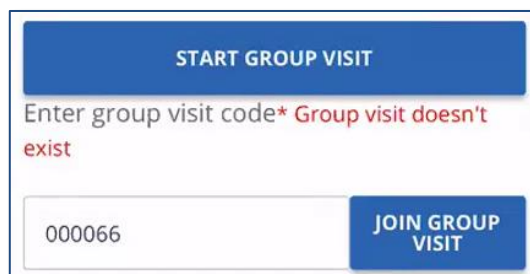


6. Enter the 6-digit group visit code and tap **JOIN GROUP VISIT**.



The screenshot shows a mobile application interface with a blue header. Below the header, there are two tabs: "CLIENTS" and "SEARCH CLIENT". Under "SEARCH CLIENT", there is a search bar labeled "Enter Client Identifier" containing the number "1". Below the search bar is a blue button labeled "SEARCH CLIENT". Below this, there is a card for a client with the identifier "TESTVU@TEST01\$ KMSVU@TEST001\$". The card lists the following information: Client ID #: 878778, Medicaid ID #: 1 8888888888, KMSVu@Test001\$, KMSVu@Test001\$, and New York, NY 90000-1234. Below the card are three blue buttons: "CONTINUE VISIT", "START GROUP VISIT", and "JOIN GROUP VISIT". At the bottom, there is a text input field labeled "Enter group visit code" which is highlighted with a red border, and a blue button labeled "JOIN GROUP VISIT".

- The Group Visit code must be 6-digits in length.
- The code is only valid for use within the same agency.
- If an invalid code is entered, the following message is displayed.

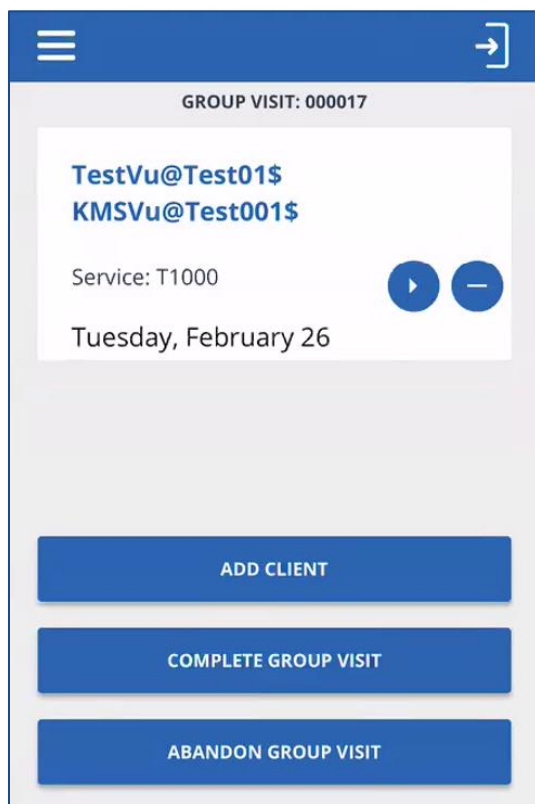



The screenshot shows a mobile application interface with a blue header. Below the header, there is a blue button labeled "START GROUP VISIT". Below the button, there is a text input field labeled "Enter group visit code*" with the error message "Group visit doesn't exist" displayed in red text below it. Below the input field is a blue button labeled "JOIN GROUP VISIT".

7. A confirmation screen displays asking the employee to confirm the start of the group visit. Tap **YES**.



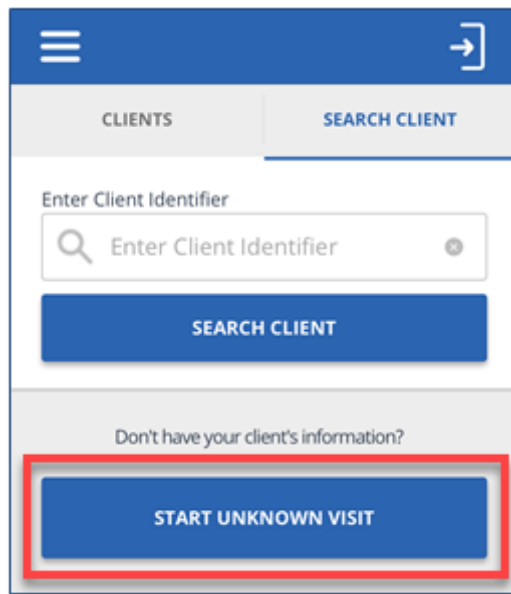
The client is added to the existing in progress Group Visit. The employee may add additional clients or log out of SMC.



Adding an Unknown Client to a Group Visit

If the Medicaid ID or Client ID entered when searching for a client does not return any results, the employee can add an unknown client to the group visit. An employee can only add a maximum of one unknown client to a group visit.

1. From the home screen, Tap **START UNKNOWN VISIT**.



2. Enter the required information and tap **CONTINUE VISIT**.
 - **FIRST NAME** (Required)
 - **LAST NAME** (Required)
 - **MEDICAID ID #** (Optional – if available)

START UNKNOWN VISIT

Please enter the client's name before continuing

FIRST NAME *

LAST NAME *

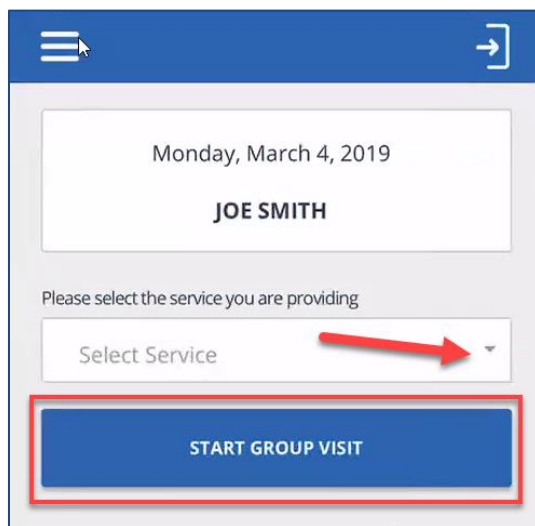
MEDICAID ID #

*denotes required field

CANCEL

CONTINUE VISIT


3. Select the Service from the drop-down list and tap **START GROUP VISIT**.



Monday, March 4, 2019

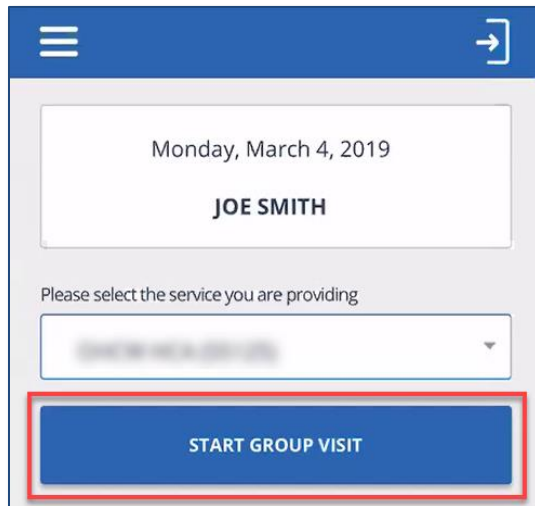
JOE SMITH

Please select the service you are providing

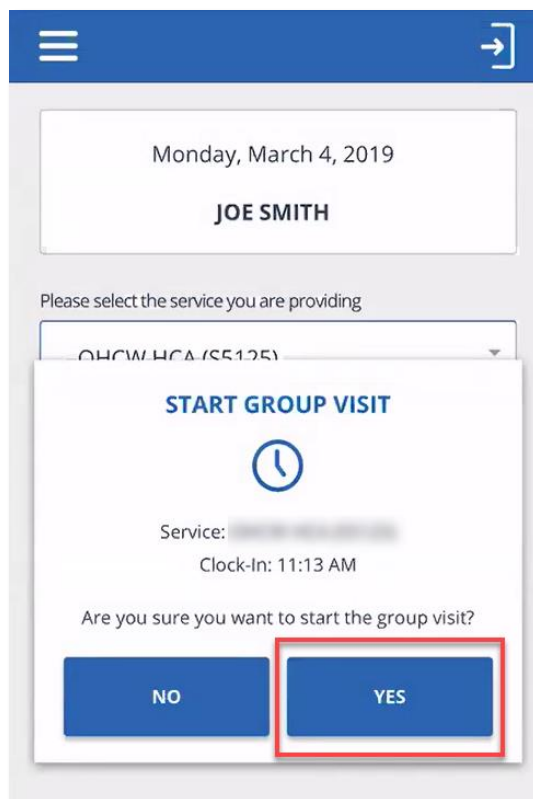
Select Service 

START GROUP VISIT

4. Tap **START GROUP VISIT** again.



5. Tap **YES** to confirm adding the unknown client to the group visit.



Completing a Group Visit

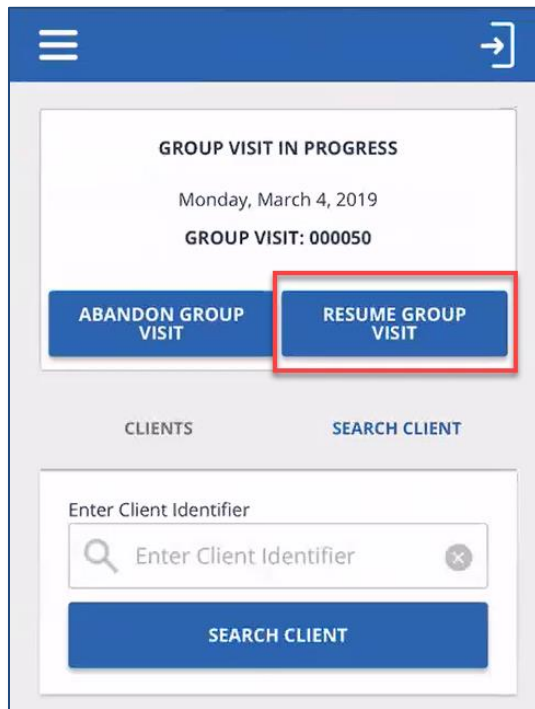
An employee can complete his or her visits within a group individually or complete all visits within a group together.



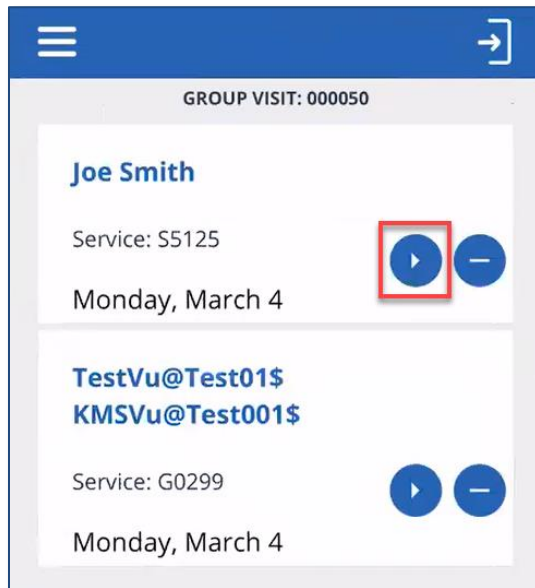
Completing all visits within a group at the same time requires that the visit process is the same for all the clients (e.g. all visits do not require client confirmation during the call-out process). If one or more clients have a different call-out process, the employee must complete the visits individually.

Completing a visit within a Group Visit Individually

1. Log back in to SMC.
2. Tap **RESUME GROUP VISIT**.



3. Tap the 'Play' icon () on a visit to complete.



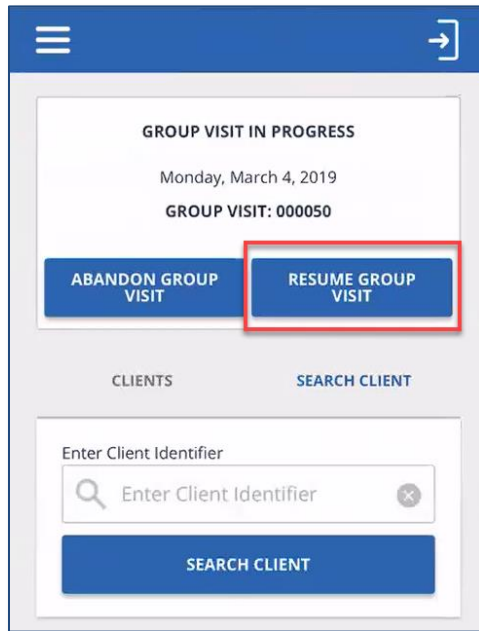
4. Complete the visit following the individual visit process.



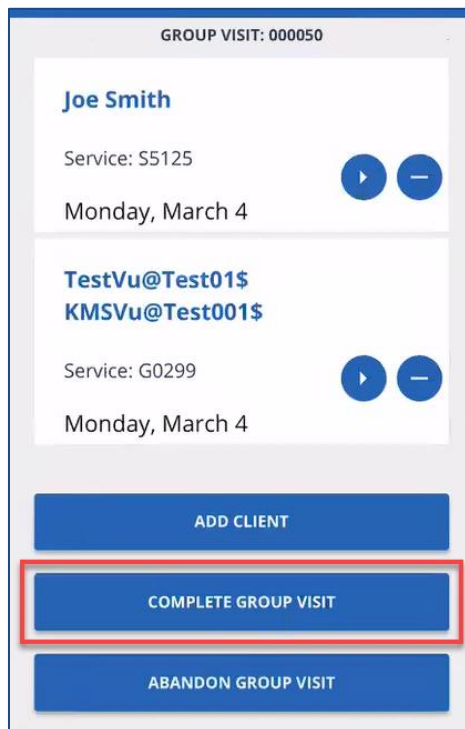
Tapping the 'dash' icon (⊖) allows the employee to abandon the individual visit. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

Completing all visits within a Group Visit Together

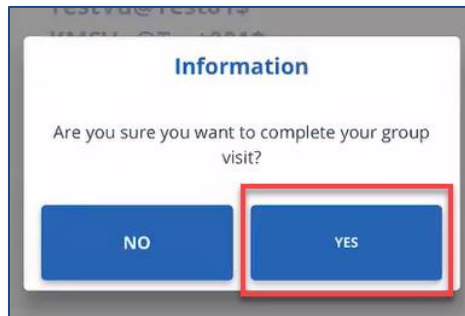
1. Log back in to SMC.
2. Tap **RESUME GROUP VISIT**.



3. Tap **COMPLETE GROUP VISIT**.



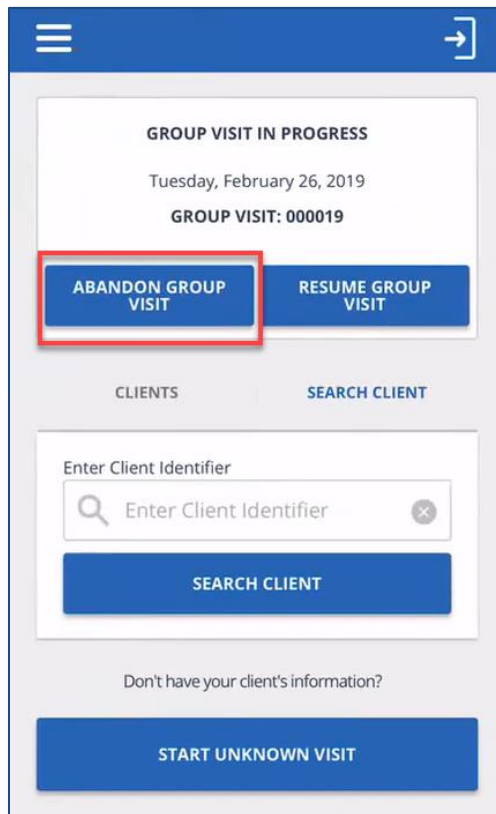
4. Tap **YES** to confirm completion of the group visit.



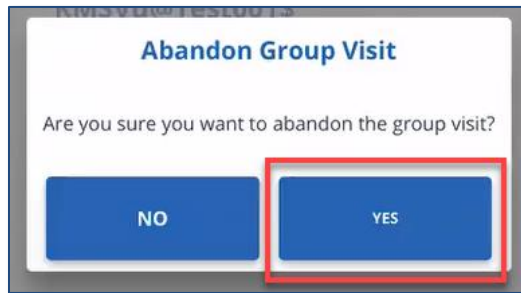
When completing a group visit, the employee is completing his or her client's visits.

Abandoning a Group Visit

1. Log back in to SMC.
2. Tap **ABANDON GROUP VISIT**.




3. Tap **YES** to confirm abandoning the group visit.



When abandoning a group visit, all of the employee's visits within the group appear in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

Telephonic Visit Verification

Group Visit Call Reference Guide Sample


















Call Reference Guide:
«COMPANY_NAME»

Agency Account Number: STX«ACCOUNT»



Write your Santrax ID number above for easy reference.



Dial:
1-«Primary_Phone»
Or
1-«Secondary_Phone»



Features:
 STX ID Verification / Playback Group Visit – Yes
 CIOP Select Service
 Client Voice Recording Client Verification: Visit
 Client Verification: Service


Calling Instructions	STX«ACCOUNT»
<p>Calling In: When arriving at the client's home, make sure you have the following information:</p> <ul style="list-style-type: none"> • Your Santrax ID. • Your Client(s) ID. • Group visit code if available. 	
<p>1.  Dial any of the toll-free numbers assigned to your agency. <i>If you are experiencing difficulties with the first toll-free number, please use the second toll-free number.</i></p>	
<p> Santrax will say: "Welcome, please <u>enter</u> your Santrax ID."</p>	
<p>2.  Press the numbers of your Santrax ID on the touch tone phone.</p>	
<p> Santrax will say: "You entered (SANTRAX ID). Press (1) for Yes, (2) for No."</p>	
<p>3.  Press (1) to confirm your Santrax ID or press (2) to retry.</p>	
<p> Santrax will say: "Is this a group visit? Press (1) for Yes or (2) for No."</p>	
<p>4.  Press (1) for group visit.</p>	
<p> Santrax will say: "Press (1) to start a new group visit, (2) to continue to your group visit, (3) to join a group visit, or (4) to exit group visit menu."</p>	
<p><i>(1) To start a new group visit:</i></p>	<p><i>(3) To join an existing group visit:</i></p>
<p>5.  Press (1) to start a new group visit.</p>	<p>5.  Press (3) to join an existing group visit.</p>
<p> Santrax will say: "You will start a new group visit with visit code (GROUP CODE)."</p>	<p> Santrax will say: "Please enter the group visit code."</p>
<p>6. Continue to step 7.</p>	<p>6.  Press the numbers of the group visit code.</p>
<p> Santrax will say: "You will <i>join</i> the group visit with visit code (GROUP CODE)."</p>	
<p> "... Please press (1) to add a client to the group visit, (2) to complete a visit for a client, (3) to hear the group visit code, (4) to abandon this whole group visit or hang up if you would like to end this call."</p>	

Calling Instructions STX«ACCOUNT»

7.  Press (1) to add a client.
 Santrax will say: "Please select (1) to call in or (2) to call out."


8.  Press the (1) key to "Call In".
 Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."



9.  Press the numbers of the client's ID.
 Santrax will say: "Please enter second client ID or hang up if done."



10. Repeat step 9 for each additional client beyond the first.
 Or
 Hang up if done.



Calling Out: When leaving the client's home, make sure you have the following information:

- Your Santrax ID.
- The Service ID.
- The group visit code.
- The Client is available to verify the visit.



11. Follow steps 7 thru 10 and then continue.
 Santrax will say: "Press (1) to start a new group visit, (2) to continue to your group visit, (3) to join a group visit, or (4) to exit group visit menu."



12.  Press (2) to continue your group visit.
 Santrax will say: "Please enter the group visit code."



13.  Press the numbers of the group visit code.
 Santrax will say: "You will continue group visit with visit code (GROUP CODE). Please press (1) to add a client to the group visit, (2) to complete a visit for a client, (3) to hear the group visit code, (4) to abandon this whole group visit or hang up if you would like to end this call."
NOTE: If you made a mistake and need to discard all data you have previously entered for all visits in this group, press (4) to abandon the whole group visit.



14.  Press the (2) key to complete the visit for a client.
 Santrax will say: "Please select (1) to call in or (2) to call out."



Calling Instructions STX«ACCOUNT»



15.  Press the (2) key to "Call Out".
 Santrax will say: "Received at (TIME). Please enter first client ID or hang up if done."



16.  Press the numbers of the client's ID.
 Santrax will say: "Please enter the Service ID."



17.  Press the Service ID Number you performed.
Refer to your agency's service list.
 Santrax will say: "You entered (SERVICE). Please press (1) to accept, (2) to retry."



18.  Press the one (1) key to accept, or press the two (2) key to retry.
 Santrax will say: "To record the client's voice please press (1) and hand the phone to the client, or press (2) if the client is unable to participate."


19.  Press '1' to record the client's voice.
 OR
 Press '2' if the client is unable to participate.
If the client is unable to participate, skip to step 20.

20.  Hand the phone to the client and the client will be asked to state their name and today's date.
 Santrax will say: "Please say your first and last name and today's date."

21.  The client should say their first and last name and today's date.
 Santrax will say: "In call received at (TIME). Out call received at (TIME). Total visit length (NUMBER) minutes. Press (1) to confirm, (2) to deny, (3) to replay."

22.  The client should press the appropriate option.
 Santrax will say: "The service performed was (SERVICE). Press (1) to confirm, (2) to deny, (3) to replay."

23.  The client should press the appropriate option.
 Santrax will say: "Please enter second client ID or hang up if done."

24. Repeat steps 16 thru 19 for each additional client beyond the first.
 Or
 Hang up if done.

Group Visit Call Process – English Line

Call-In	
1	Dial either English toll-free number. Santrax will say: "Welcome, please enter your Santrax ID."
2	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV). Santrax will say: "You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No." If the Santrax ID entered does not match to an employee record, Santrax will say: "You have entered an invalid Santrax ID, please try again."
3	Press 1 for Yes.

	Santrax will say: <i>"Is this a Group Visit, press 1 for Yes or 2 for No."</i>
	Press 1 for Yes.
	Santrax will say: <i>"Press 1 to start a new group visit, 2 to continue to your group visit, 3 to join a group visit, 4 to exit group visit menu."</i>
4	Press 1 to start a new group visit.
	Santrax will say: <i>"You will start a new group visit with group visit code [XXXXXX]. Please press 1 to add a client to the group visit, 2 to complete a visit for a client, 3 to hear the group visit code, 4 to abandon this whole group visit or hang up if you would like to end this call."</i>
5	Press 1 to add a client.
	Santrax will say: <i>"Press 1 to call-in or 2 to call-out."</i>
6	Press 1 to call-in.
	Santrax will say: <i>"Received at [Time]. Please enter first client ID or hang up if done."</i>
7	Enter the client ID for the first client being added to the group visit.
	Santrax will say: <i>"Enter second client ID or hang up if done." *</i> *Repeat step 7 for each client being added to the group visit.
8	Hang up.

Call-Out	
1	Dial either English toll-free number. Santrax will say: <i>"Welcome, please enter your Santrax ID."</i>
2	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV). Santrax will say: <i>"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."</i> If the Santrax ID entered does not match to an employee record, Santrax will say: <i>"You have entered an invalid Santrax ID, please try again."</i>
3	Press 1 for Yes. Santrax will say: <i>"Is this a Group Visit, press 1 for Yes or 2 for No."</i>
4	Press 1 for Yes. Santrax will say: <i>"Press 1 to start a new group visit, 2 to continue to your group visit, 3 to join a group visit, 4 to exit group menu."</i>
5	Press 2 to continue the group visit. Santrax will say: <i>"Please enter the group visit code." *</i> *If the code entered is not valid, Santrax will say: <i>"You have entered an invalid visit code. Please try again."</i>
6	Enter the 6-digit group visit code. Santrax will say: <i>"You will continue the group visit with visit code [XXXXXX]. Please press 1 to add a client to the group visit, 2 to complete visit for a client, 3 to hear the group visit code, 4 to abandon this whole group visit or hang up if you would like to end this call."</i>
7	Press 2 to complete the visit. Santrax will say: <i>"Please select 1 to call-in or 2 to call out."</i>
8	Press 2 to call-out. Santrax will say: <i>"Received at [Time]. Please enter first client ID or hang up if done."</i>
9	Enter the client ID number. Santrax will say: <i>"Please enter the Service ID."</i>
10	Press the three-digit ID of the care performed. Santrax will say: <i>"You entered [Service]. Please press 1 to accept, 2 to retry."</i>
11	Press the 1 to accept.

After the service, Santrax will say: "To record the client's voice please press 1 and hand the phone to the client or press 2 if the client is unable to participate.

Press 1 to record client's voice (hand phone to client):

Santrax will say: "Please say your first and last name and today's date."

The client will say their name and the date

Santrax will say: "In call received at [Time]. Out call received at [Time]. Total visit length [number] minutes. Press one to confirm, two to deny."

Client will press appropriate choice.

Santrax will say: "The service performed was [service]. Press one to confirm, two to deny."

Client will press appropriate choice.

Santrax will say: "Enter second client ID or hang up if done."

Enter the next client ID to complete from the group visit.

(repeat steps 8 – 10 for each additional client in the group)

Hang up when the last client has been entered.

Group Visit Call Process – Multi-Language Line

Call-In	
1	Dial either English toll-free number.
	<i>Santrax will say: "For English, please press one (1). For Egyptian Arabic, please press two (2). For French, please press three (3). For Fulah, please press four (4). For Hindi, please press five (5). For Mandarin Chinese, please press six (6). For Nepali, please press seven (7). For Russian, please press eight (8). For Serbian, please press nine (9). For Somali, please press ten (10). For Spanish, please press eleven (11). For Swahili, please press twelve (12). For Vietnamese, please press thirteen (13)."</i> <i>*Each prompt will be heard in its respective language.</i>
2	Press the number that corresponds to the desired language.
	<i>Santrax will say: "Welcome, please enter your Santrax ID."</i>
3	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	<i>Santrax will say: "You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."</i> <i>If the Santrax ID entered does not match to an employee record, Santrax will say: "You have entered an invalid Santrax ID, please try again."</i>
4	Press 1 for Yes.
	<i>Santrax will say: "Is this a Group Visit, press 1 for Yes or 2 for No."</i>
5	Press 1 for Yes.
	<i>Santrax will say: "Press 1 to start a new group visit, 2 to continue to your group visit, 3 to join a group visit, 4 to exit group visit menu."</i>
6	Press 1 to start a new group visit.
	<i>Santrax will say: "You will start a new group visit with group visit code [XXXXXX]. Please press 1 to add a client to the group visit, 2 to complete a visit for a client, 3 to hear the group visit code, 4 to abandon this whole group visit or hang up if you would like to end this call."</i>
7	Press 1 to add a client.
	<i>Santrax will say: "Press 1 to call-in or 2 to call-out."</i>
8	Press 1 to call-in.
	<i>Santrax will say: "Received at [Time]. Please enter first client ID or hang up if done."</i>
9	Enter the client ID for the first client being added to the group visit.
	<i>Santrax will say: "Enter second client ID or hang up if done." *</i>

	*Repeat step 9 for each client being added to the group visit.
10	Hang up.

Call-Out	
1	Dial either English toll-free number.
	<p><i>Santrax will say: "For English, please press one (1). For Egyptian Arabic, please press two (2). For French, please press three (3). For Fulah, please press four (4). For Hindi, please press five (5). For Mandarin Chinese, please press six (6). For Nepali, please press seven (7). For Russian, please press eight (8). For Serbian, please press nine (9). For Somali, please press ten (10). For Spanish, please press eleven (11). For Swahili, please press twelve (12). For Vietnamese, please press thirteen (13).</i></p> <p><i>*Each prompt will be heard in its respective language.</i></p>
2	Press the number that corresponds to the desired language.
	Santrax will say: <i>"Welcome, please enter your Santrax ID."</i>
3	Press the numbers of the Santrax ID (this is system generated and can be found in the employee record in Sandata EVV).
	<p>Santrax will say: <i>"You entered [repeats the Santrax ID entered], press 1 for Yes, press 2 for No."</i></p> <p>If the Santrax ID entered does not match to an employee record, Santrax will say: <i>"You have entered an invalid Santrax ID, please try again."</i></p>
4	Press 1 for Yes.
	Santrax will say: <i>"Is this a Group Visit, press 1 for Yes or 2 for No."</i>
5	Press 1 for Yes.
	Santrax will say: <i>"Press 1 to start a new group visit, 2 to continue to your group visit, 3 to join a group visit, 4 to exit group menu."</i>
6	Press 2 to continue the group visit.
	<p>Santrax will say: <i>"Please enter the group visit code." *</i></p> <p><i>*If the code entered is not valid, Santrax will say: "You have entered an invalid visit code. Please try again."</i></p>
7	Enter the 6-digit group visit code.
	Santrax will say: <i>"You will continue the group visit with visit code [XXXXXX]. Please press 1 to add a client to the group visit, 2 to complete visit for a client, 3 to hear the group visit code, 4 to abandon this whole group visit or hang up if you would like to end this call."</i>
8	Press 2 to complete the visit.
	Santrax will say: <i>"Please select 1 to call-in or 2 to call out."</i>
9	Press 2 to call-out.
	Santrax will say: <i>"Received at [Time]. Please enter first client ID or hang up if done."</i>

10	Enter the client ID number.
	<i>Santrax will say: "Please enter the Service ID."</i>
11	Press the three-digit ID of the care performed (Service IDs are listed on the back of the Call Reference Guide).
	<i>Santrax will say: "You entered [Service]. Please press 1 to accept, 2 to retry."</i>
12	Press the 1 to accept.
	<p><i>After the service, Santrax will say: "To record the client's voice please press 1 and hand the phone to the client or press 2 if the client is unable to participate."</i></p> <p>Press 1 to record client's voice (hand phone to client):</p> <p><i>Santrax will say: "Please say your name and today's date."</i></p> <p>The client will say their name and the date.</p> <p><i>Santrax will say: "In call received at [Time]. Out call received at [Time]. Total visit length [number] minutes. Press one to confirm, two to deny."</i></p> <p>Client will press appropriate choice.</p> <p><i>Santrax will say: "The service performed was [service]. Press one to confirm, two to deny."</i></p> <p>Client will press appropriate choice.</p> <p><i>Santrax will say: "Enter second client ID or hang up if done."</i></p> <p>Enter the next client ID to complete from the group visit.</p> <p>(repeat steps 10 – 12 for each additional client in the group)</p> <p>Hang up when the last client has been entered.</p>



For DODD clients, when Santrax prompts: *"To record the client's voice please press 1 and hand the phone to the client or press 2 if the client is unable to participate."*

Press 2 to skip the client visit verification steps, since the functionality does not apply to DODD clients. Repeat this for each DODD client associated with the call.

Visit Maintenance - Generating/Editing Group Visit Codes



A group visit code is only valid for a maximum of 24 hours. Within the 24 hour period, once the last visit in group ends, the code is closed. The same code cannot be re-generated within 72 hours.

Adding a Code

If a visit that took place should have been captured as a group visit, a user can create a group visit code after the fact in Visit Maintenance. The group visit code can be generated from the *General* screen of the Visit Details by clicking the **GENERATE GROUP VISIT** button. This creates a 6-digit code and adds it to the **GROUP VISIT CODE** field.

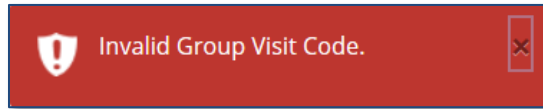
MEMO CLAIMS HISTORY	AGENCY ID	AGENCY NAME	PAY HOURS	
	10010	OHIO QA Template Agency 1	01:00	
	PAYER	PROGRAM	SERVICE	GROUP VISIT CODE
	ODM	OHC	OHCW HCA (S51)	
	CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	
	No	No	No	
	VISIT SOURCE	SCHEDULE ID	GENERATE GROUP VISIT CODE	
TestingQA123				

Editing a Code

If a visit is linked to an incorrect group visit or was supposed to be part of an existing group visit, a user can edit the existing code in the **GROUP VISIT CODE** field on the General screen of the Visit Details.

MEMO CLAIMS HISTORY	AGENCY ID	AGENCY NAME	PAY HOURS	
	10010	OHIO QA Template Agency 1		
	PAYER	PROGRAM	SERVICE	GROUP VISIT CODE
	ODM	OHC	OHCW HCA (S51)	000184
	CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	
	Yes	Yes	Yes	
	VISIT SOURCE	SCHEDULE ID		
TestingQA123				

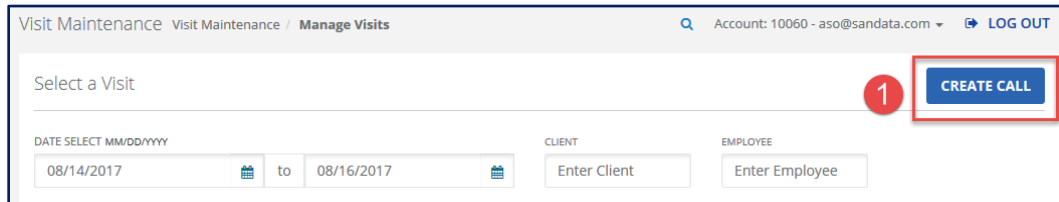
If the code entered is not a valid group visit code, an invalid group visit code message displays.



Create Call

The Create Call feature allows the user to create a call in Sandata EVV for instances when a visit occurred but the employee did not call-in or call-out.

1. Click **CREATE CALL** on the *Visit Maintenance* screen.

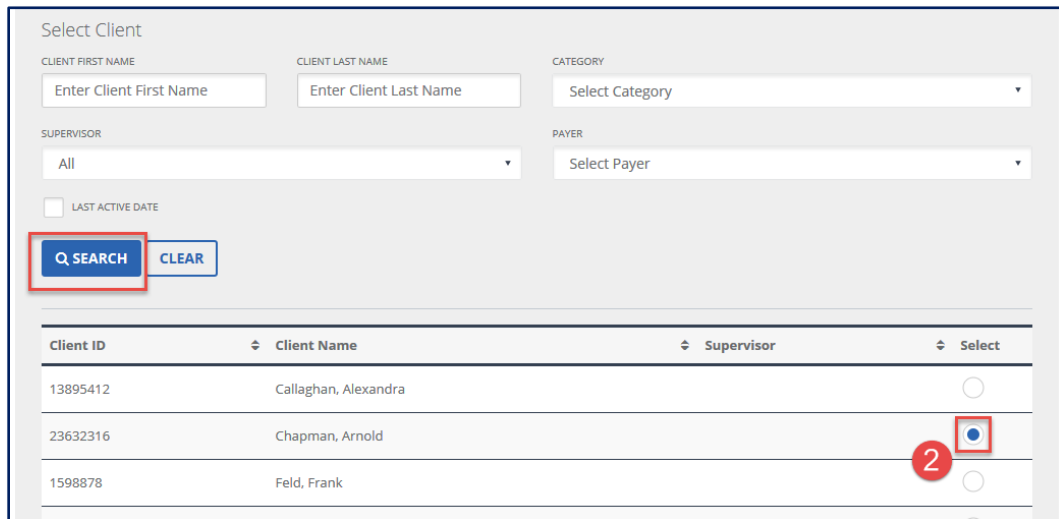


Visit Maintenance Visit Maintenance / Manage Visits Account: 10060 - aso@sandata.com LOG OUT

Select a Visit 1 CREATE CALL

DATE SELECT MM/DD/YYYY 08/14/2017 to 08/16/2017 CLIENT Enter Client EMPLOYEE Enter Employee

2. Search for and select a client.



Select Client

CLIENT FIRST NAME Enter Client First Name CLIENT LAST NAME Enter Client Last Name CATEGORY Select Category

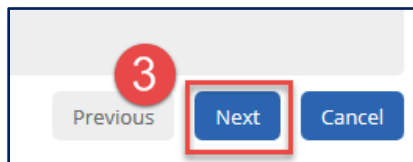
SUPERVISOR All PAYER Select Payer

LAST ACTIVE DATE

Q SEARCH CLEAR

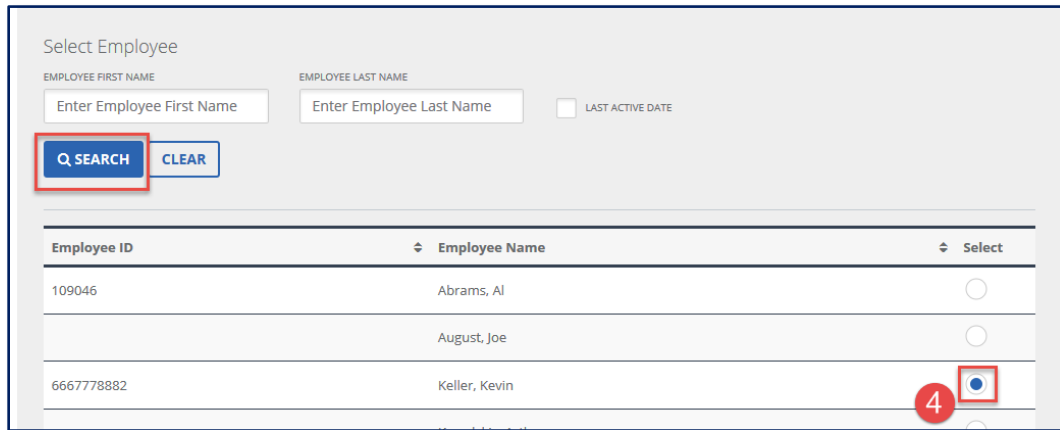
Client ID	Client Name	Supervisor	Select
13895412	Callaghan, Alexandra		<input type="radio"/>
23632316	Chapman, Arnold		<input checked="" type="radio"/> 2
1598878	Feld, Frank		<input type="radio"/>

3. Click **Next**.



3 Previous Next Cancel

4. Search for and select an employee.



Select Employee

EMPLOYEE FIRST NAME: Enter Employee First Name

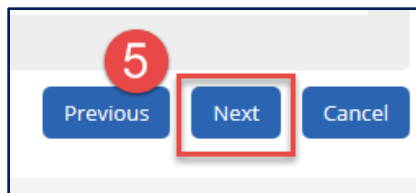
EMPLOYEE LAST NAME: Enter Employee Last Name

LAST ACTIVE DATE

Q SEARCH CLEAR

Employee ID	Employee Name	Select
109046	Abrams, Al	<input type="radio"/>
	August, Joe	<input type="radio"/>
6667778882	Keller, Kevin	<input checked="" type="radio"/>

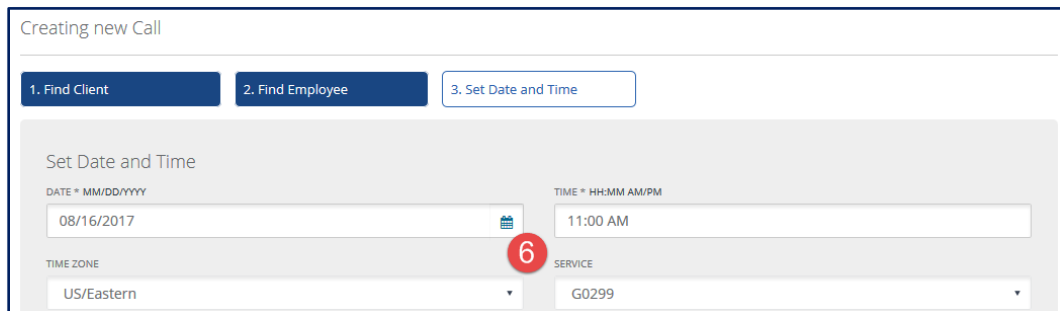
5. Click **Next**.



5

Previous **Next** Cancel

6. Enter the **DATE***, **TIME*** and **SERVICE** details.



Creating new Call

1. Find Client 2. Find Employee 3. Set Date and Time

Set Date and Time

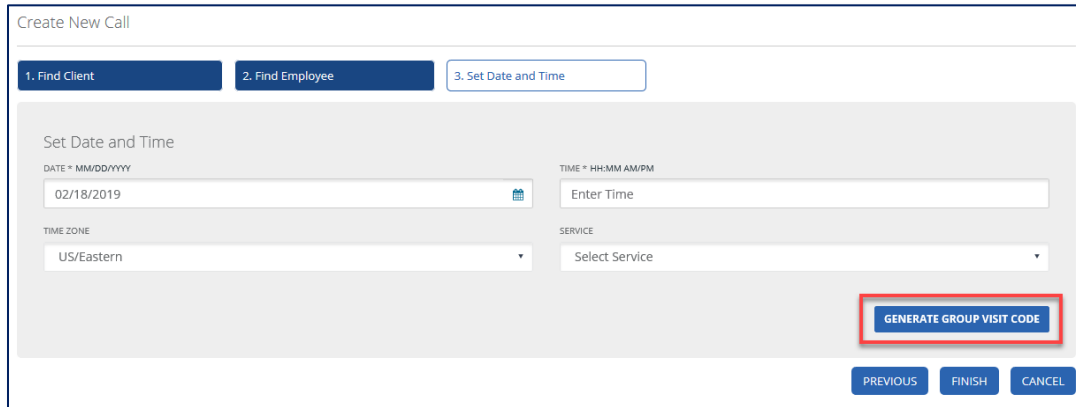
DATE * MM/DD/YYYY: 08/16/2017

TIME * HH:MM AM/PM: 11:00 AM

TIME ZONE: US/Eastern

SERVICE: G0299

If creating a group visit call, click the **GENERATE GROUP VISIT CODE** button to obtain a group visit number.



Create New Call

1. Find Client 2. Find Employee 3. Set Date and Time

Set Date and Time

DATE * MM/DD/YYYY
02/18/2019

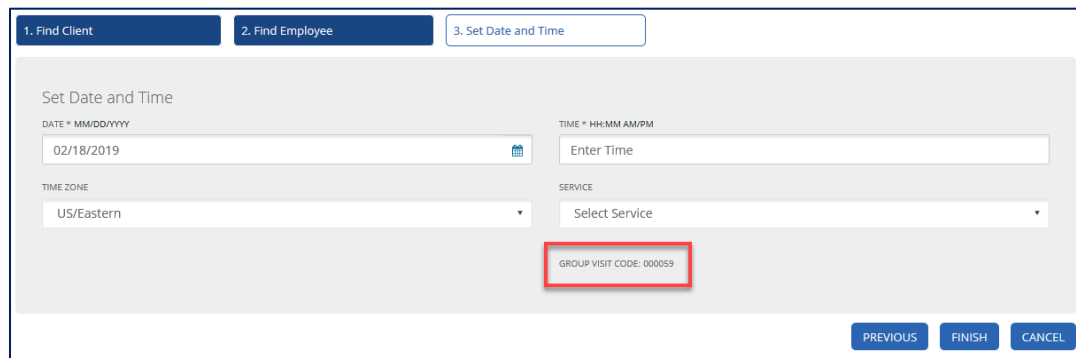
TIME * HH:MM AM/PM
Enter Time

TIME ZONE
US/Eastern

SERVICE
Select Service

GENERATE GROUP VISIT CODE

PREVIOUS FINISH CANCEL



1. Find Client 2. Find Employee 3. Set Date and Time

Set Date and Time

DATE * MM/DD/YYYY
02/18/2019

TIME * HH:MM AM/PM
Enter Time

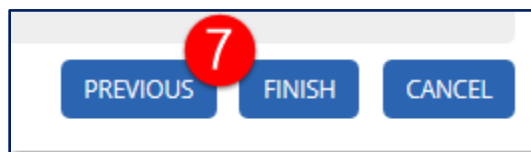
TIME ZONE
US/Eastern

SERVICE
Select Service

GROUP VISIT CODE: 000059

PREVIOUS FINISH CANCEL

7. Click **FINISH**.



PREVIOUS **7** FINISH CANCEL

10 Appendix

Glossary

A

Administrator	The person at the agency with the ability to create new users, assign roles, system privileges and reset passwords.
Aggregator	A central data store for Sandata EVV and alternate data collection EVV systems
Alternate EVV System	Any EVV system that is not Sandata's

B

Bring Your Own Device	The term used for the option of an employee/Direct Care Worker choosing to use their personal mobile device to call-in and call-out for visits.
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C

Client/Individual	A person who receives services through the Medicaid program
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D

DAS	Department of Administrative Services
Dashboard	Real-time status of the current day's visit exceptions
DCW	Direct Care Worker
DODD	Department of Developmental Disabilities

E

Employee/Direct Care Worker	A person who is employed by an agency provider to provide care to one or more clients
EVV	Electronic Visit Verification
Exception	Any visit data which Sandata EVV has denoted with a colored circle because it is either missing information or does not meet the rules established for the program

I

Individual/Client	A person who receives services through the Medicaid program
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M

Manual Call	Corrective action for the visit exception Visit Without In-Call/Visit Without Out-Call.
MCO	Managed Care Organization
MIT	Medicaid Information Technology System – Ohio’s claims adjudication system, which is managed and operated by DXC Technology

O

ODA	Ohio Department of Aging
ODM	Ohio Department of Medicaid
ODM EVV	All parts of Sandata’s EVV solution—provider portal, EVV technologies and Aggregator
OHC	Ohio Home Care

P

PDN	Private Duty Nursing
Privilege	A single permission

R

Reason Code	A pre-defined list of reasons/explanations for the various correction scenarios. A reason code must be selected when making a change to data in Visit Maintenance.
Role	A group of privileges (permissions) assigned to the user which allows the user to perform visit activities in Sandata EVV

S

Sandata EVV	Sandata’s Electronic Visit Verification system
Security	The module in Sandata EVV where users (office staff) are set up to use the system
Sandata Mobile Connect	Sandata’s Mobile Visit Verification application

T

Telephonic	The system used to record calls for visits.
Telephony (TVV)	The use of a telephone to record visit data and verification when SMC is not available

U

User	A person with a unique login and password to Sandata EVV
Username	The user's email address

V

Visit	A "visit" is the electronic service provided during an in-person encounter to a client in a home and community-based setting.
Visit Maintenance	The module within Sandata EVV where visits can be corrected and/or acknowledged

11 Next Steps

Recommended Agency Checklist for Next Steps

- Register in eTRAC with your Provider Medicaid ID#
 - <https://etraconline.net/login>.
 - Refer to your training completion email for reference and also chapter 5 in the training manual
- Download Welcome Kit (EVV log-in credentials and Call Reference Guide)
- Log into EVV
 - Input Users and Define Roles
 - Input Employee's (Be sure to check "Mobile User" box)
 - Ensure that all employees received email with temporary password to Sandata Mobile Connect
 - Train all employees on Sandata Mobile Connect (on MVV device or App)
 - Supply employees with Call Reference Guides for TVV, Santrax ID and Client ID for individuals
 - Input Clients/Individuals
 - Order Devices for Individuals
 - Select payers, programs and services

Important Resources

- EVV Provider Hotline number 855-805-3505
- ODM EVV website for FAQ's, Welcome to EVV Video and other important program updates www.medicaid.ohio.gov/EVV