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

Agency Provider Participant Guide

September 2020

v 1.6

Table of Contents

About this Course

Course Duration

This course is divided into modules. The estimated time to complete one module is listed at the beginning of the module chapter. Modules vary in length, between twenty minutes and two hours.

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 SMC and TVV to switch services during a visit.
- 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 Daily, Date Range, and Security 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.

Overview/Objectives

This training is an in-depth review of the Sandata EVV environment pointing out features, structure, and requirements. In this guide, 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.

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.

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 directly by ODM, ODA, or DODD.
GPS	Global Positioning System.
MCO	Managed Care Organization.
MITS	Medicaid Information Technology System – Ohio's claims adjudication system.
MVV	Sandata Mobile Visit Verification. The name of Sandata's mobile application used at the start of Phase 1 of the EVV. Moving forward, this 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.
OHCW	Ohio Home Care Waiver.
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, 2021 requirement for all states to use an EVV system, in accordance with the 21st Century Cures Act.

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.

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)

Please visit the ODM's website at https://medicaid.ohio.gov/EVV for the most up to date services subject to EVV requirements.

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.

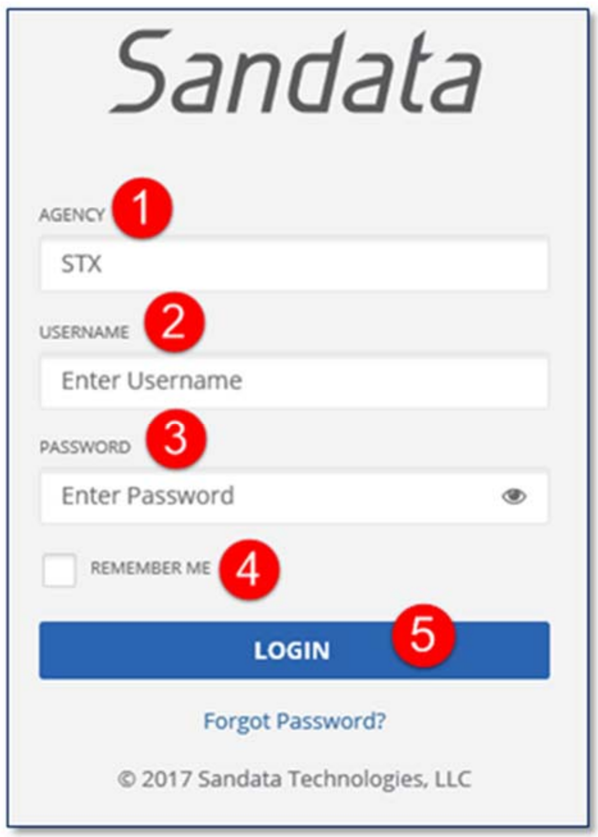
Follow the steps below to log in to Sandata EVV for the first time:

- 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.



TIP

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.

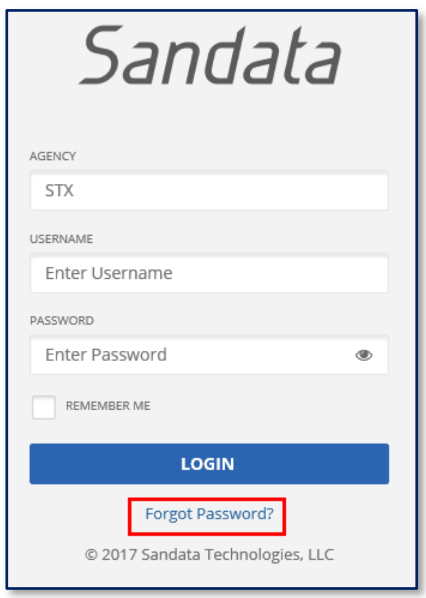
> If the Security Administrator is locked out and there are no other users with the Security Administrator to unclock the user account, then the user must call the EVV Provider Hotline at (855) 805-3505 to unlock their account.

How to Reset a Forgotten Password

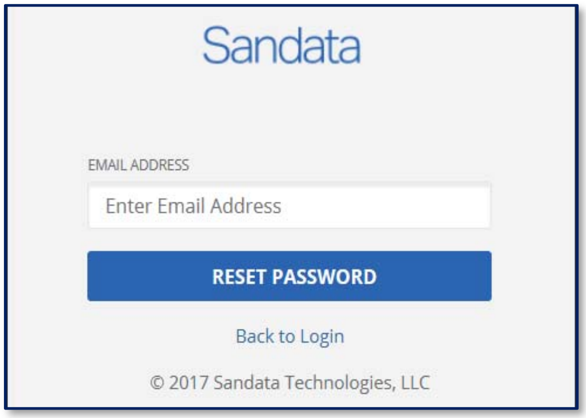
Passwords are valid for 60 days. A user will begin receiving prompts 10 days before their password expiration date to reset the password.

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).

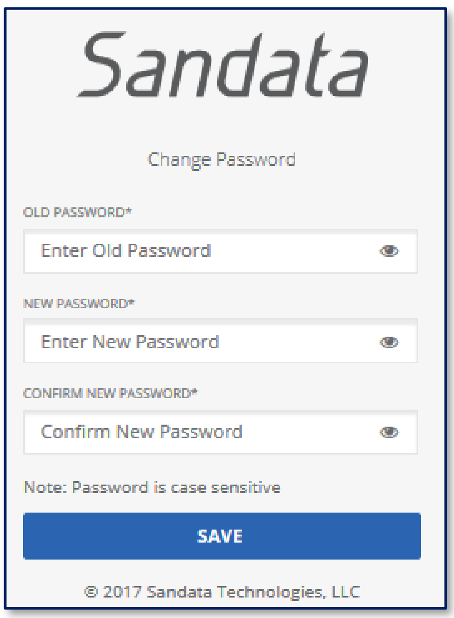
1. Click **Forgot Password?** A window opens to enter the email address to receive a temporary password.



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



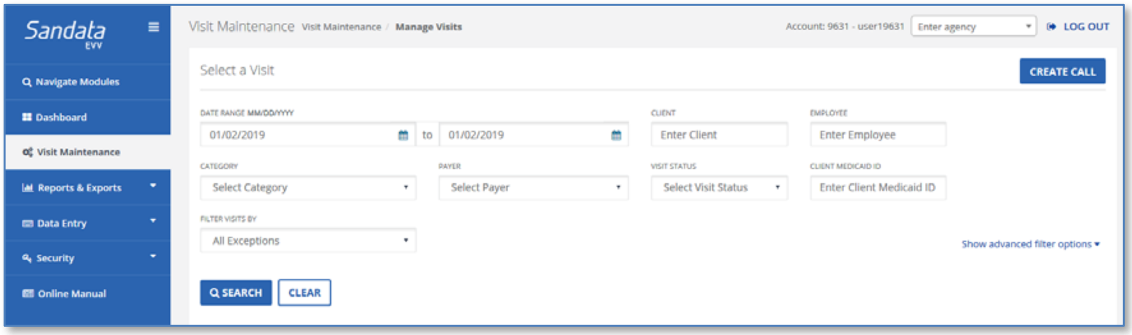
3. Click **RESET PASSWORD**. The system sends an email with a temporary password.
4. Click **Back to Login**. The *Login* screen displays.



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

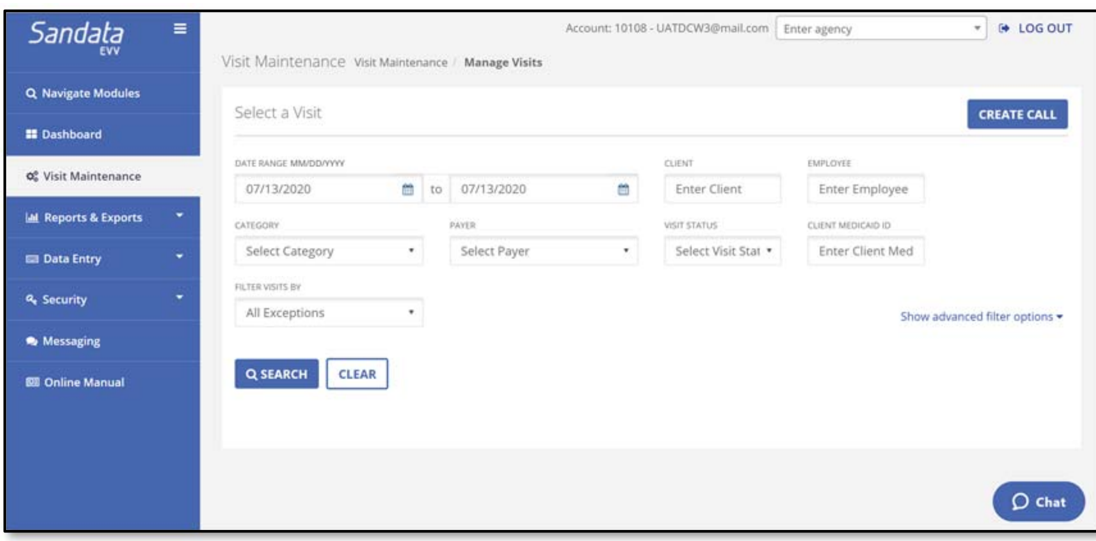
After successful login, the *Visit Maintenance* screen displays.



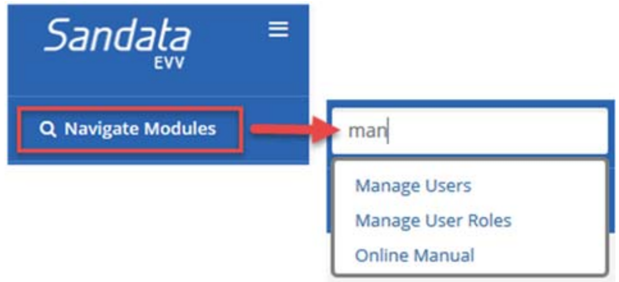
ADA Navigation Support

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.

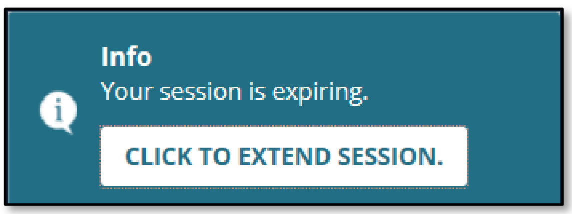
1. Using the <**Tab**> key to move through the system, the links below display individually. They allow you to skip the navigation options and begin with the main content.



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.

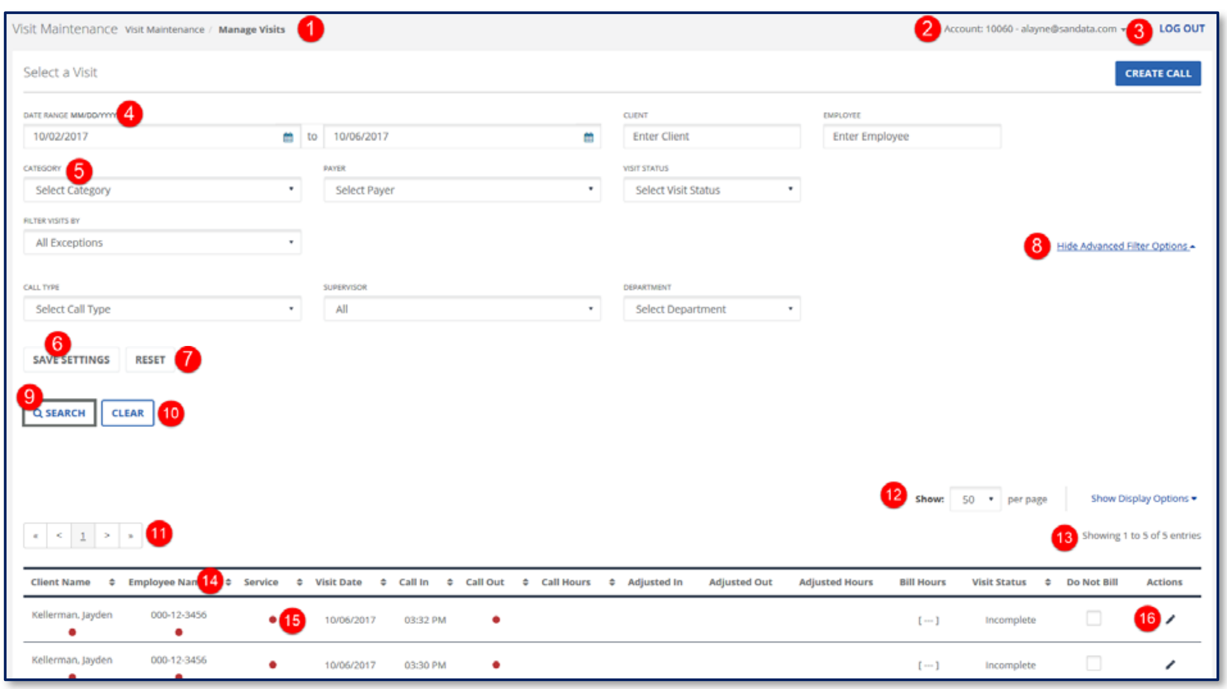


3. To accommodate users that require more time, when a user remains idle for 15 (fifteen) minutes, the system displays a warning message asking if they require more time. If the user does not respond to the prompt within 2 (two) minutes, Sandata EVV automatically times out.



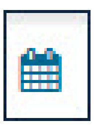
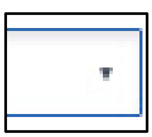
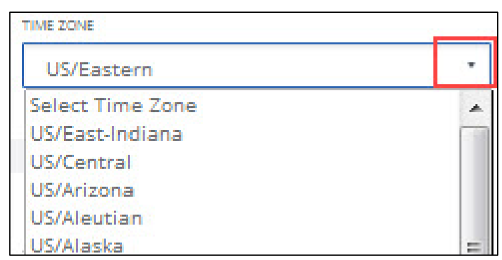
Common Functions of Sandata EVV

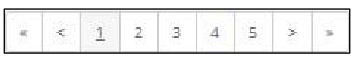
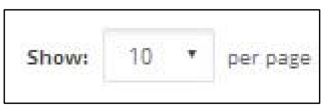
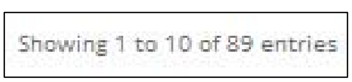
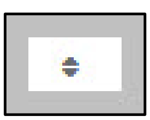
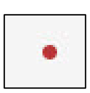
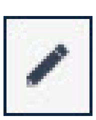
This section describes common functions within Sandata EVV. Here is an example with the different items that are typically displayed.



Common Functions of Sandata EVV

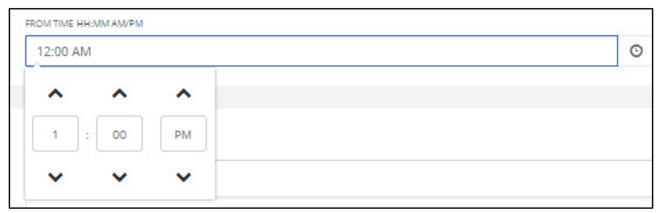
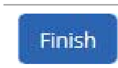
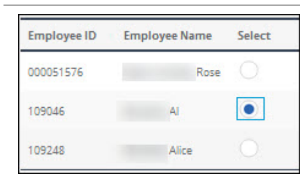
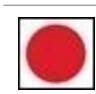
Here is a list of items commonly found in Sandata EVV.

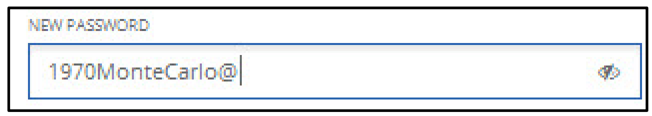
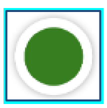
	Item	Name	Description
1.		Navigation Path	System and which screen is displayed.
2.		Account and User Display	Displays the account the user is logged into and the username/email address of the user currently logged in. For more about these fields, see the section Sandata Header.
3.		Log Out Button	Logs 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

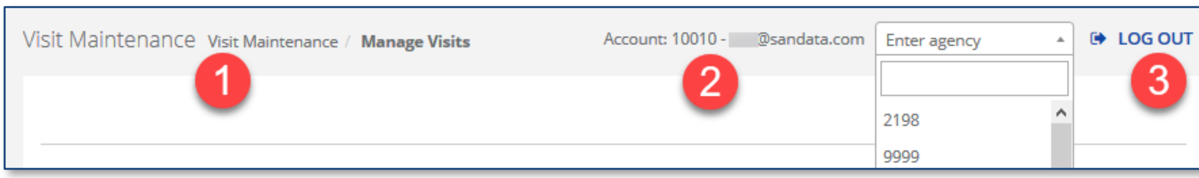
The following buttons are frequently displayed throughout the Sandata system:

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.

Button	Function	Description
REFRESH NOW	Refresh Button	Refreshes one or several fields on a screen, usually search fields.
SAVE	Save Button	Located in *Data Entry* fields, this button saves the information that has been entered.
	Show Information Icon	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. 
	Stop recording Button	Pressing this button stops the client voice recording during the SMC call-out process.
TERMINATE	Terminate Button	This button moves either a client record or an employee record to “Terminated” status.

Sandata Header

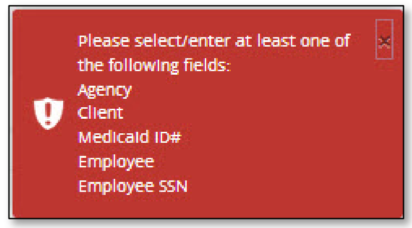
This header is located at the top of every screen in the Sandata EVV. It displays key information about each screen along with functionality to navigate between modules or to log out of the system.



	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	Displays the account the user is logged into and the username/email of the user currently logged in. Moving Between Multiple Accounts 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. A user must have permissions to log into more than one account and the username must be the same across all accounts The account the user is currently logged into is indicated by a check box.
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.



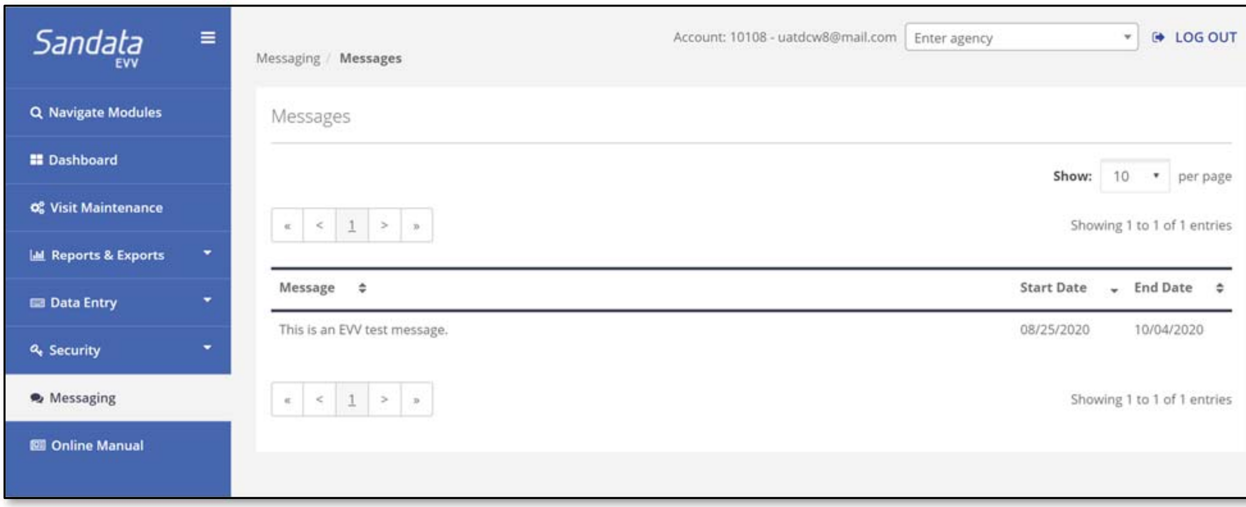
Assignment Buttons

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.

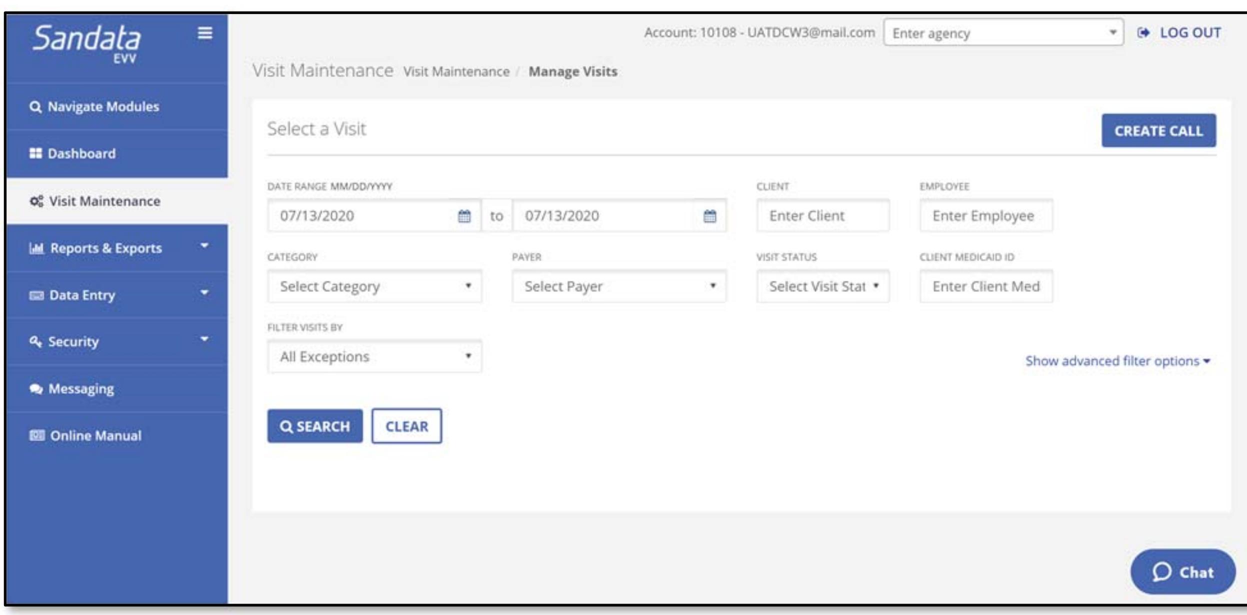
Messaging

Click the messaging tab to view incoming messages. These messages are view only – you cannot respond. The message will be visible in EVV from the **Start Date** to the **End Date**, on the right-hand side of the screen. After the end date, the message will disappear.



Chat

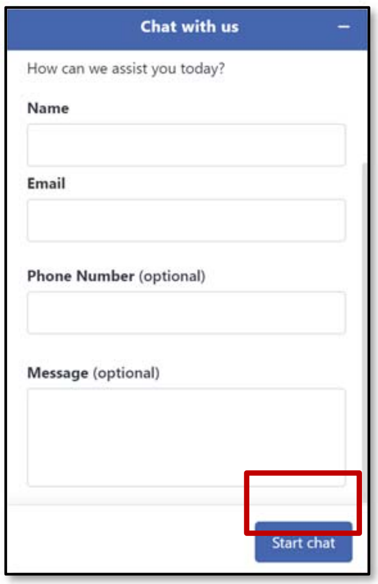
The Chat bubble allows you to communicate with the EVV Provider Hotline. Chat will appear on each screen in EVV.



Take the following steps to chat with the EVV Provider Hotline:

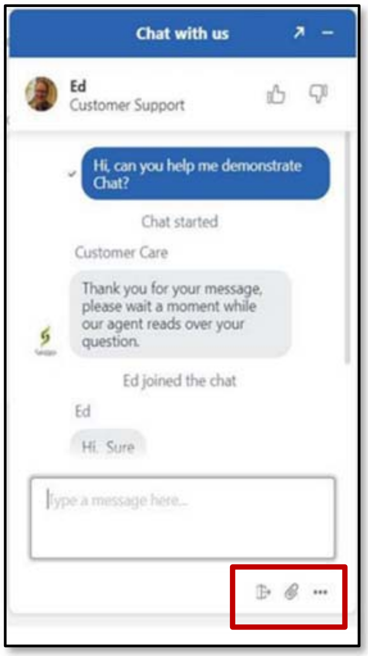
1. Click on the Chat Button.

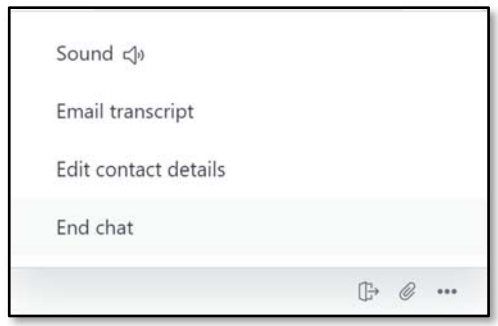
2. The chat window appears. Complete the Name and Email fields. The Phone Number and Message fields are optional. When you are ready to chat, click **Start Chat**.



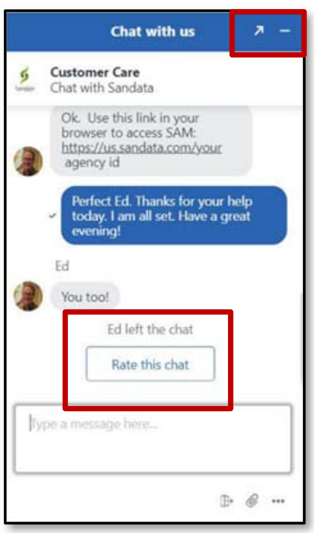
Please do not enter Personal Health Information (PHI) in the Chat.

3. An agent will join the chat. Type in your responses, and press **ENTER** to send. You may also use the **attachment** icon to attach images. Click the three dots **(…)** to adjust the volume of the chat notifications, email a copy of the chat transcript, change your contact information, or end chat. You may also click the arrow in the upper right-hand corner, to open the chat in its own browser window.





4. After the chat ends, you will have the option to rate the interaction. Click **RATE THIS CHAT**. When you are finished, click the minus icon **(-)** to minimize and close the chat window.



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

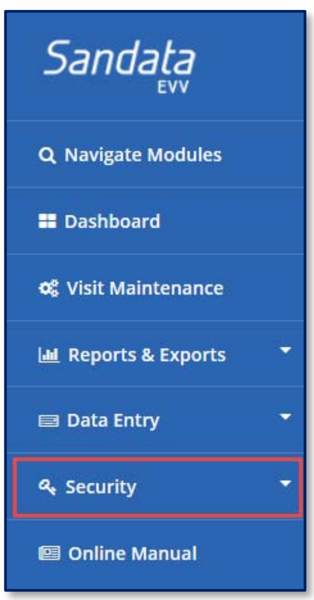
Sandata EVV Security Settings

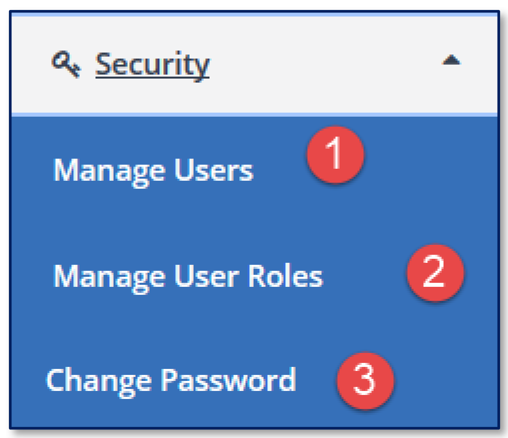
The Security settings in Sandata EVV allow Administrators to:

- 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.



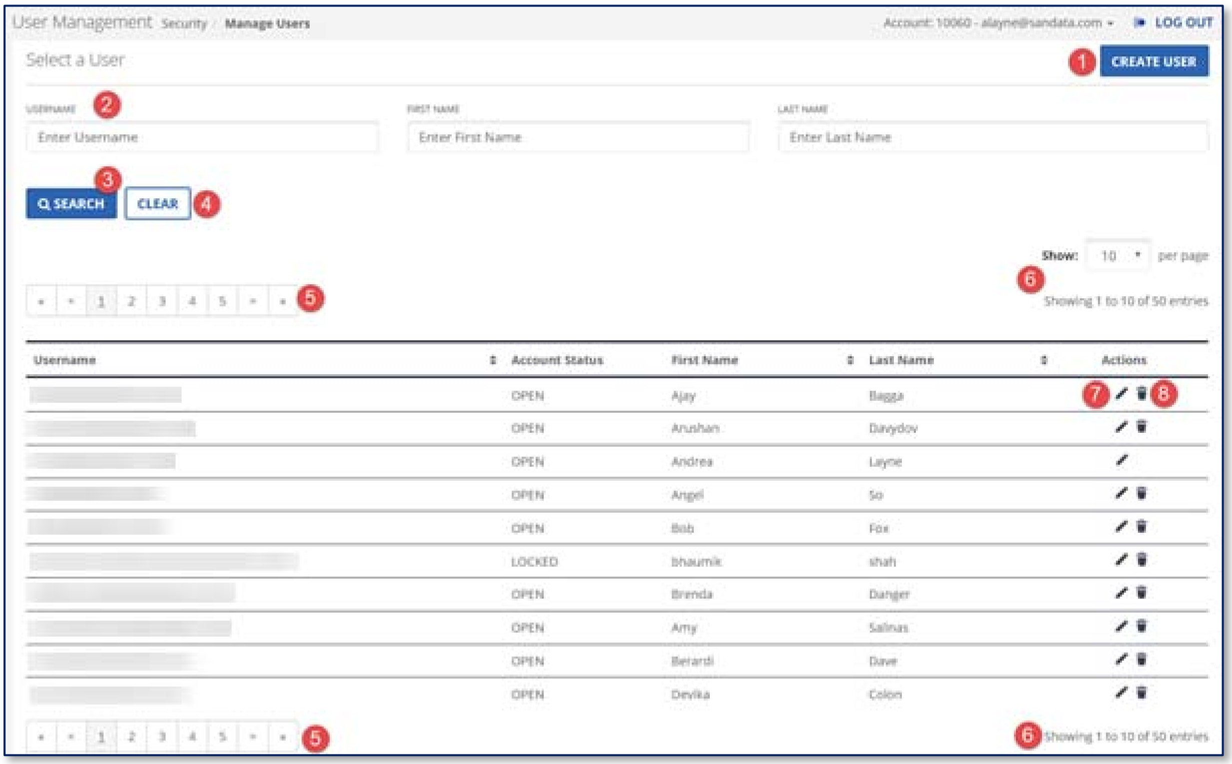


The security settings of Santrax EVV are divided into three sections:

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.

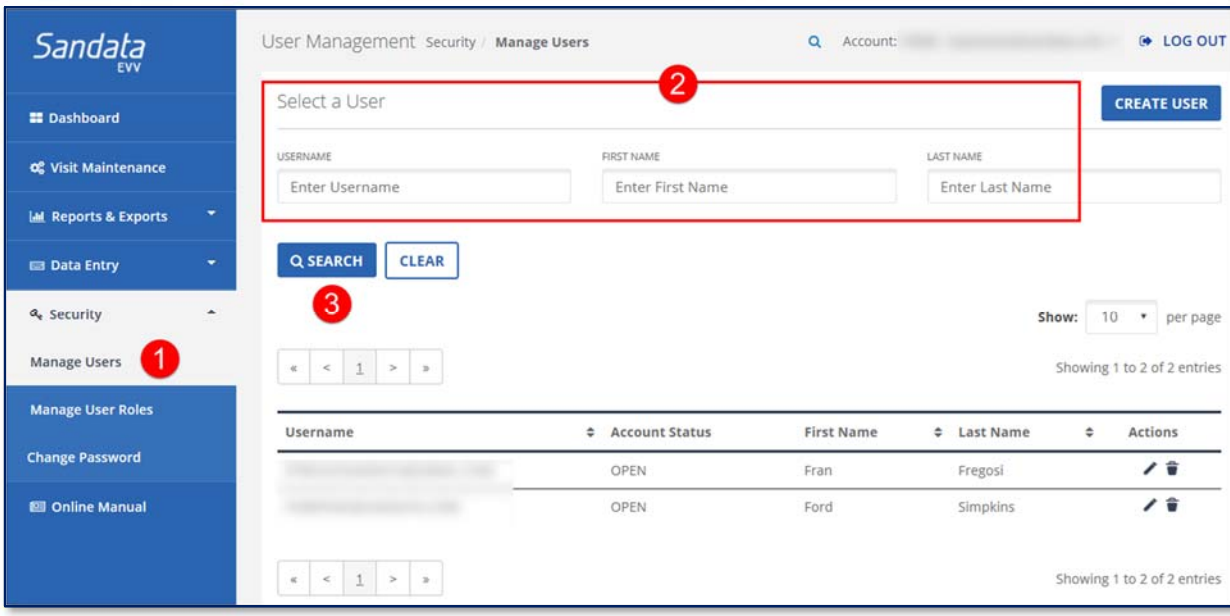


1. **CREATE USER** – Used to create a new user profile.
2. Filters – Allows for a search by either **USERNAME, FIRST NAME** or **LAST NAME** or a combination of the three.
3. **SEARCH** – Retrieves the related information based upon the filters used.
4. **CLEAR** – Deletes the information from the filter 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

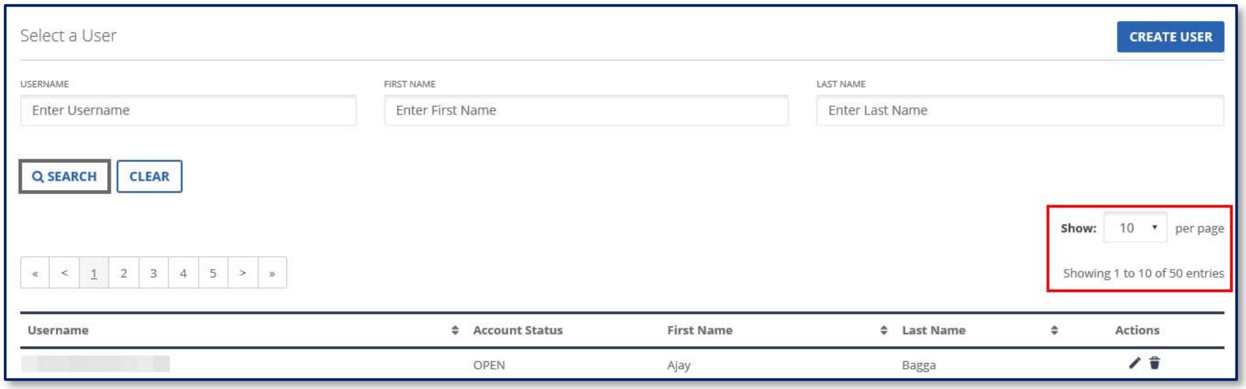
Search for users from the *Manage Users* screen.



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.

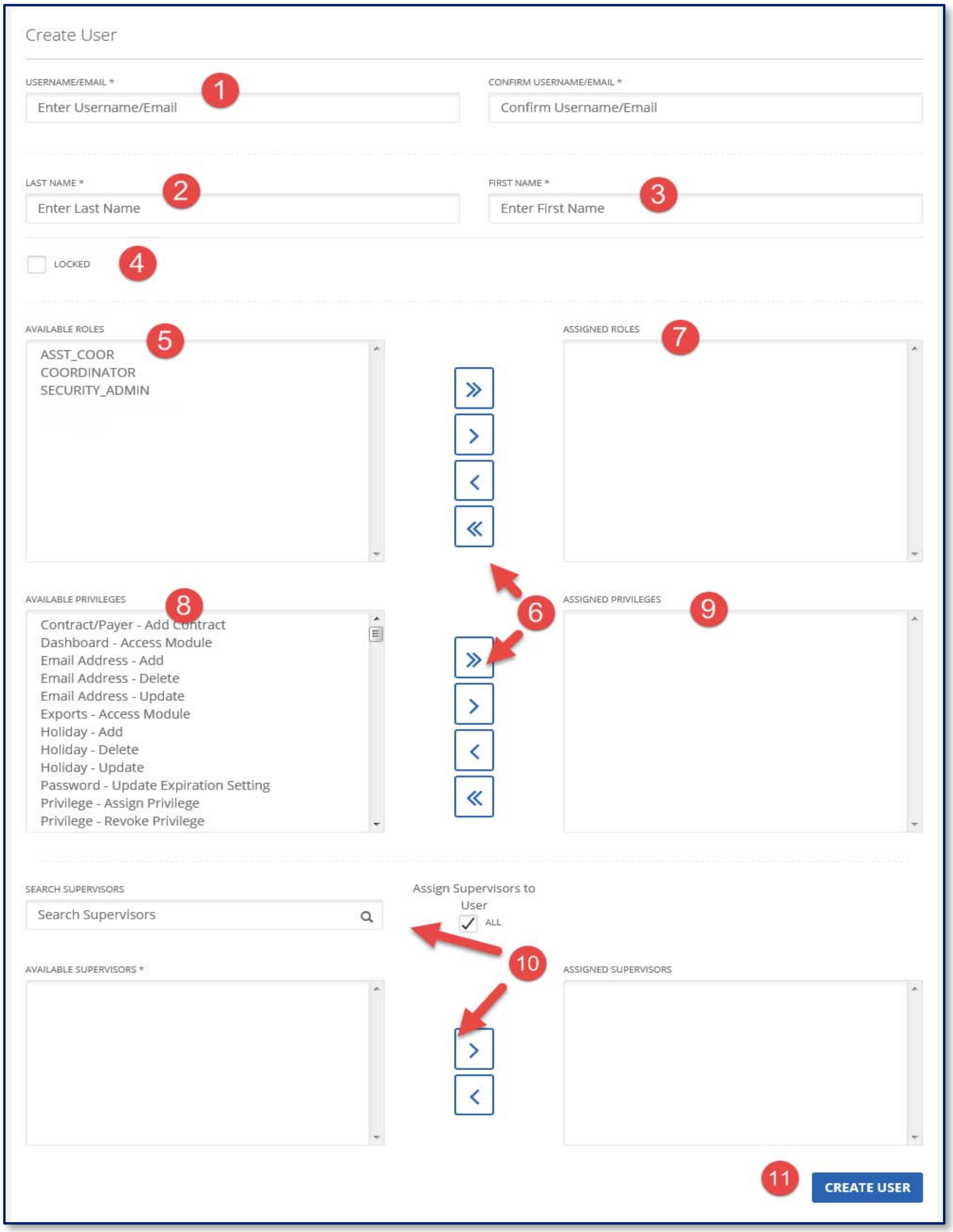
A search can be conducted with no criteria added, resulting in a complete list of users. Press <**Enter**> (on the keyboard) or click **SEARCH**.



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

Creating a New User

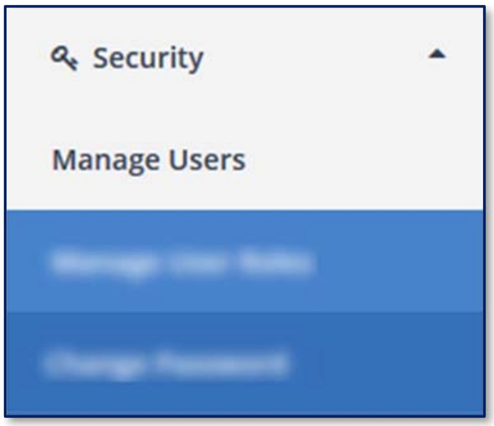
Create User Screen Overview



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.

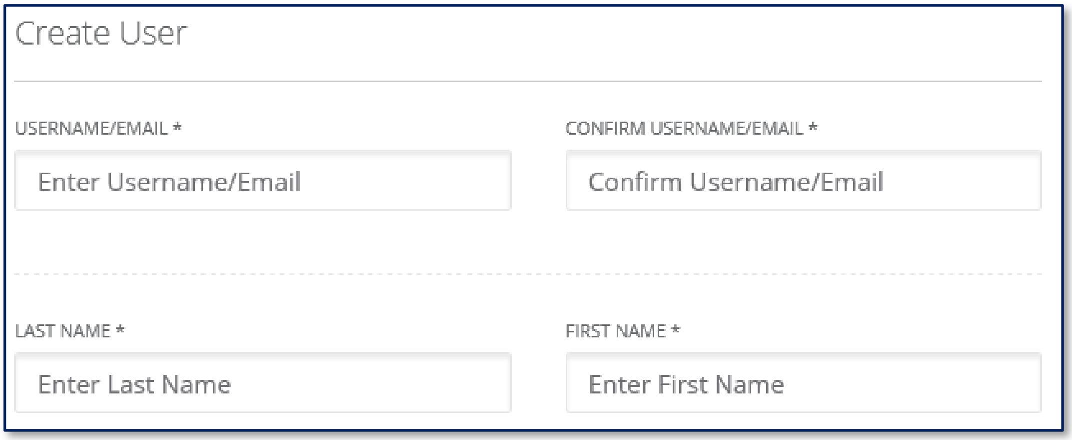
Follow along with the instructor to create a user.

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

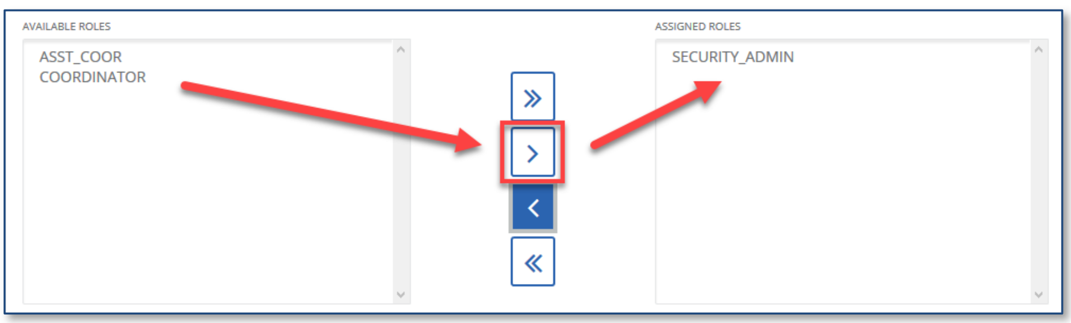


2. Click **CREATE USER.** The *Create User* screen opens.

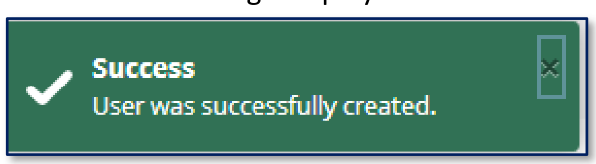
3. Enter/Confirm the user's email address and their **LAST NAME** and **FIRST NAME**.



4. The **LOCKED** checkbox prevents the user from logging into the system. Leave this field unchecked to allow the user to log in.
5. 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.



6. Click the appropriate item in the **AVAILABLE PRIVILEGES** field and click the > button to move it into the **ASSIGNED PRIVILEGES** field.
7. 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.

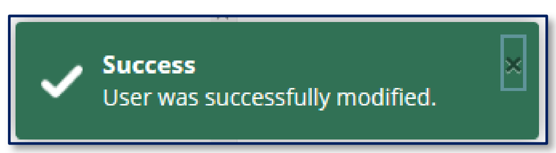
On Your Own –Create a User

Modify a User

Follow along with the instructor to modify a user.

<u>Modify User Roles/Privileges</u>

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.



<u>Lock/Unlock a User</u>

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.

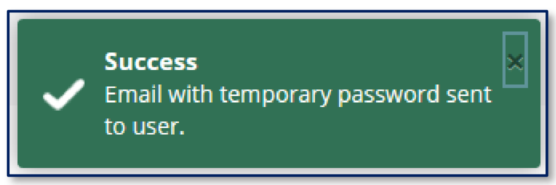
1. Perform a user search.
2. Click **Edit** in the **Actions** column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Check/Uncheck the **LOCKED** checkbox, as required.
4. Click **MODIFY USER**. A successful confirmation message displays.

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.

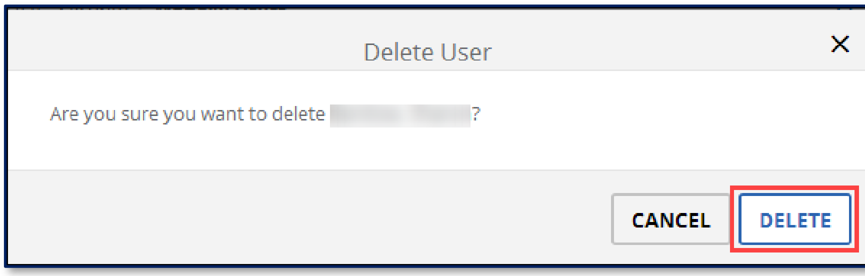
1. Perform a user search.
2. Click **Edit** in the *Actions* column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Click **RESET PASSWORD**. A message displays indicating a temporary password has been sent to the user.



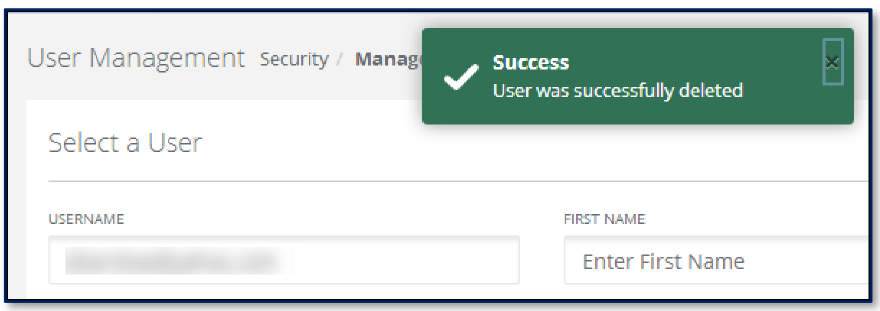
Deleting a User

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.



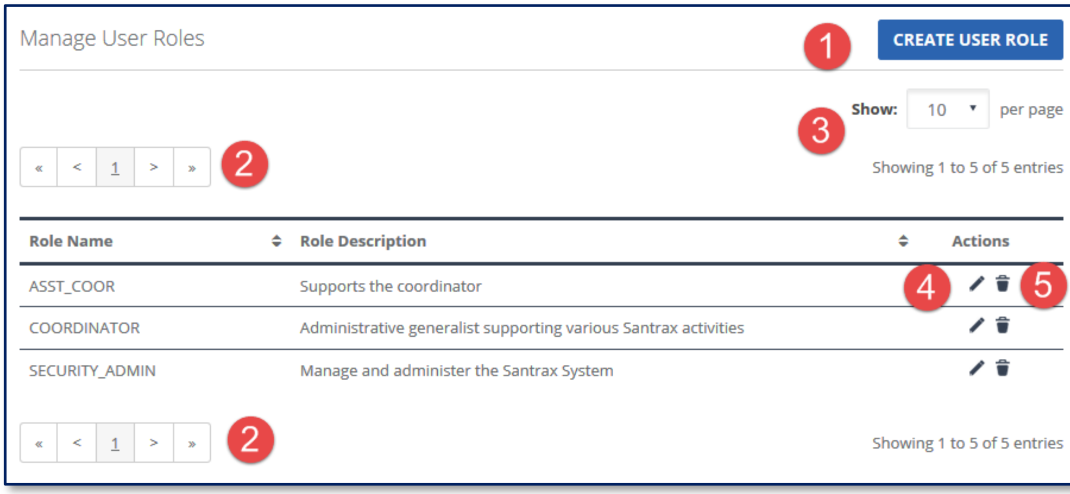
Manage User Roles

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.

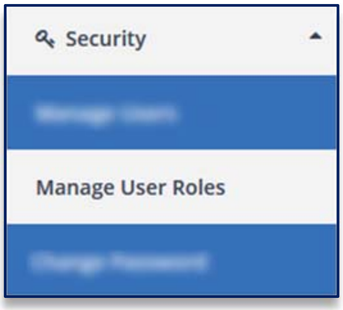
Screen Overview



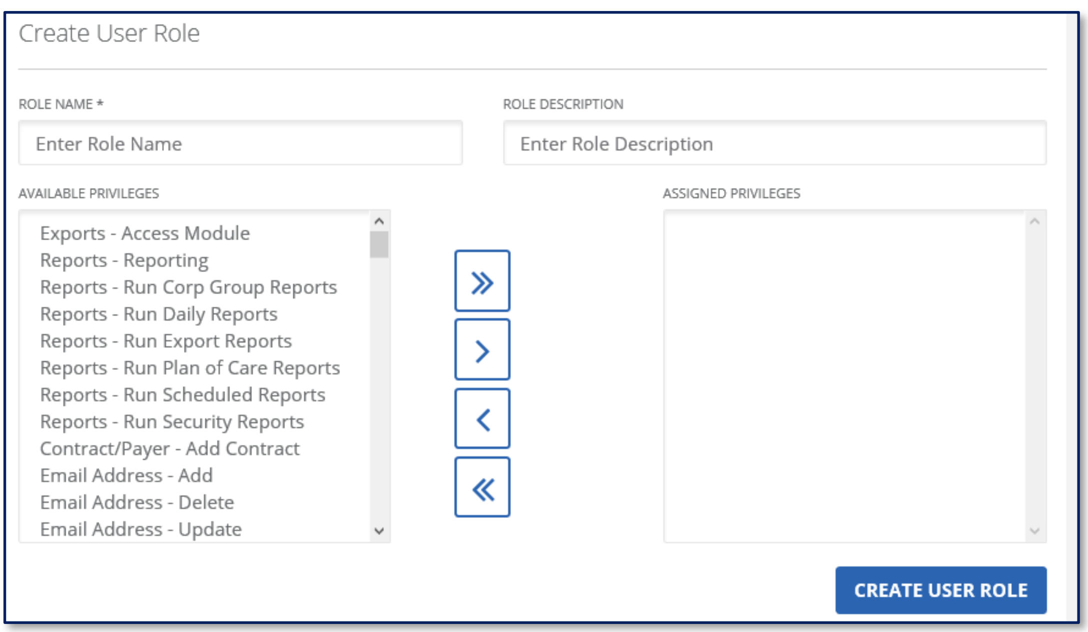
1. **Create User Role** – Used to create a new user role.
2. **Page Navigation** – Dependent upon the number of results, there can be 1 or multiple pages.
3. **Show** – Allows for input of how many entries are shown per page and displays the total number of results returned.
4. **Edit** – Edit a user.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

Creating New User Role

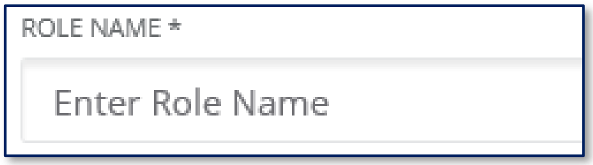
1. Click **Manage User Roles**. The *Manage User Roles* screen displays.



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



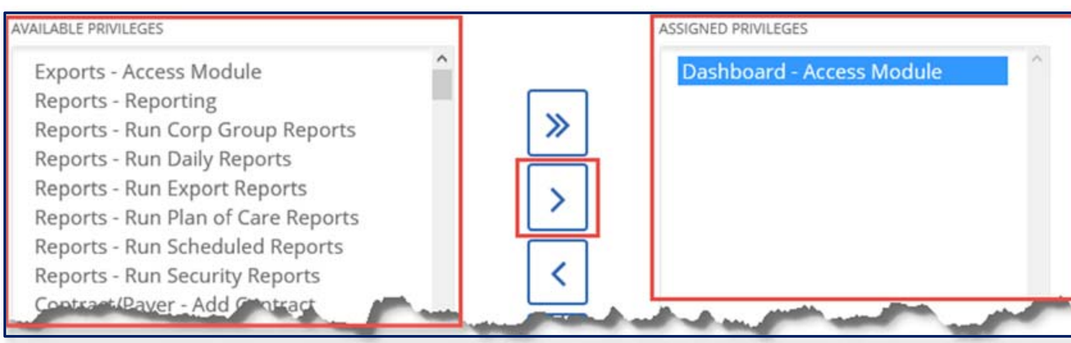
3. Enter a name for the new role in the **ROLE NAME*** field.



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.

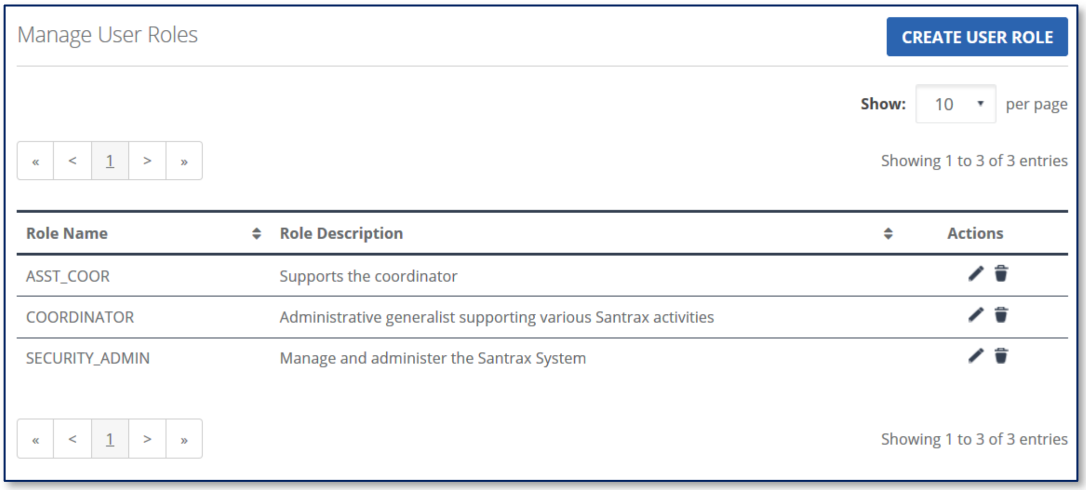


9. Click **MODIFY USER ROLE** to save the assigned privileges.

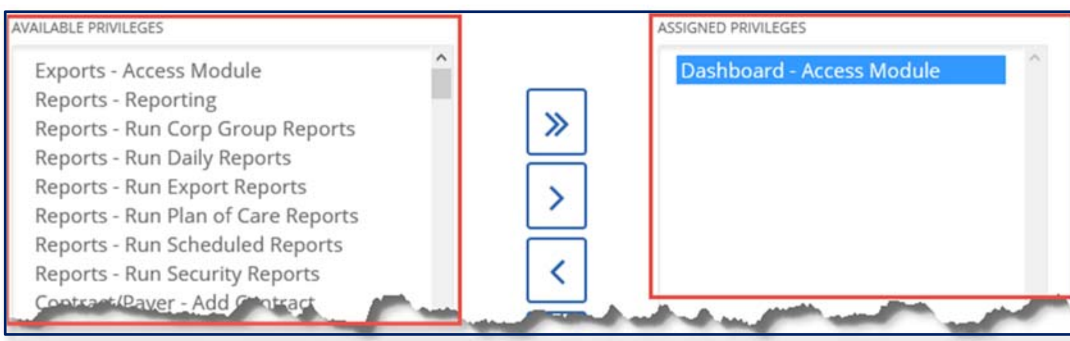
Modifying Roles

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.



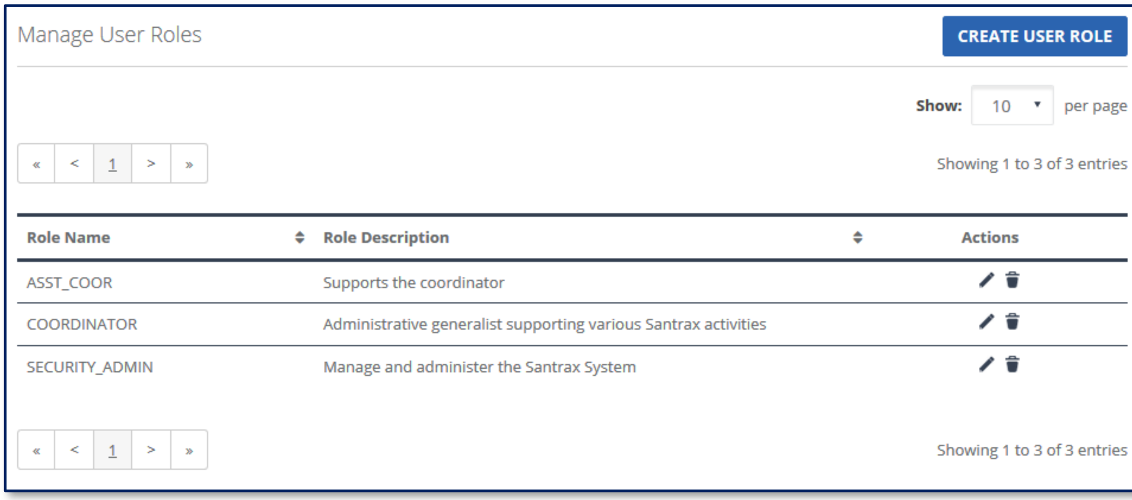
2. Click **Edit** in the **Actions** column on the right-hand side of the screen of the role to be modified. The *Modify User Role* screen opens.
3. Add (**AVAILABLE PRIVILEGES**) or remove (**ASSIGNED PRIVILEGES**), as necessary.



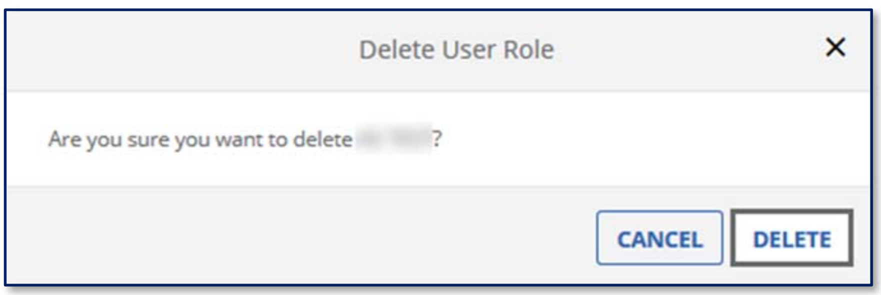
4. Click **MODIFY USER ROLE**. If successful, a confirmation message displays.

Deleting Roles

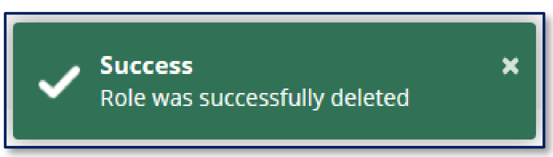
1. Scroll through the list of roles and find the role to be deleted.



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.



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

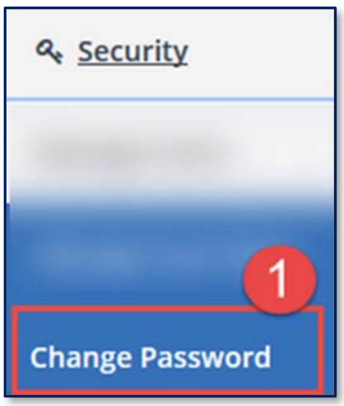


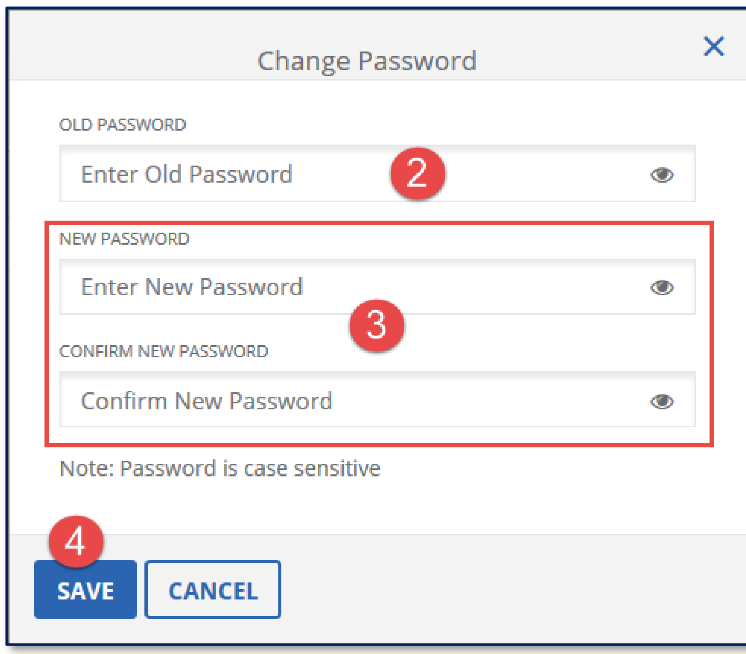
Change Password

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.





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 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

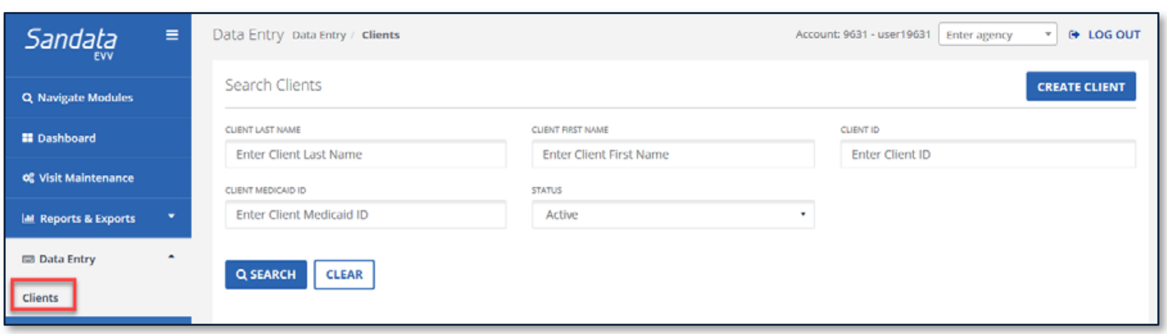
Search for a Client

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.

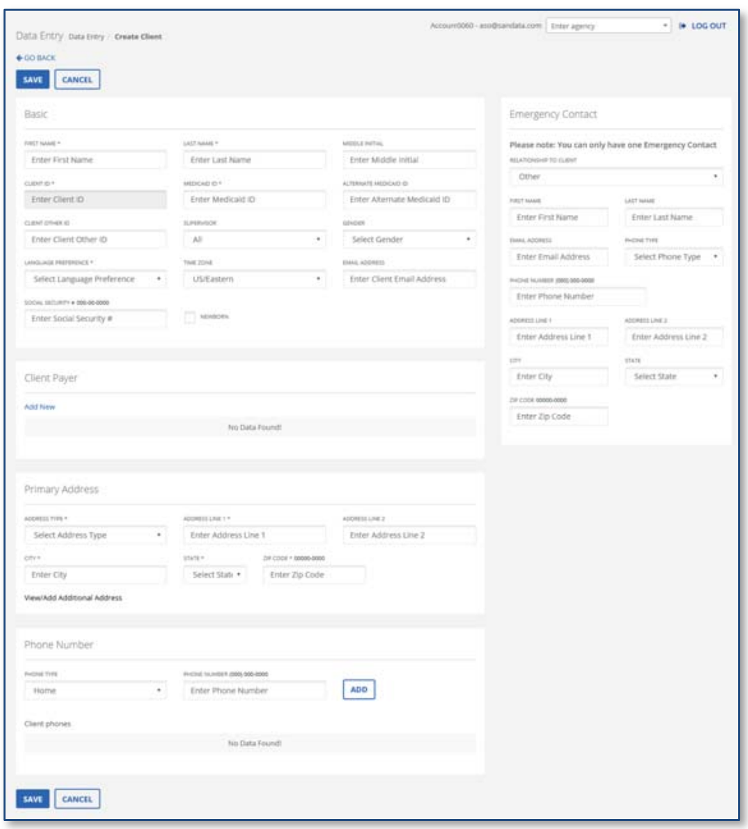
Searching with no criteria selected displays a complete list of all active clients.

Create New Client(s)

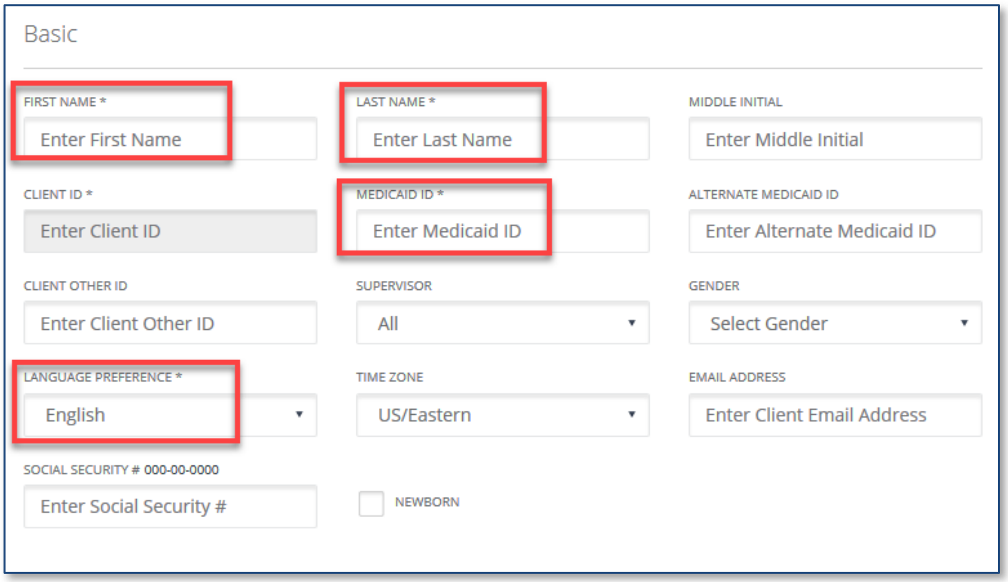
To create a new client, the **FIRST NAME*, LAST NAME***, **MEDICAID ID*** (12 digits), **LANGUAGE PREFERENCE*** and any known addresses at which the client can routinely receive care are required fields. Enter the information into the *Create New Client* screen. The required fields are indicated with 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**.

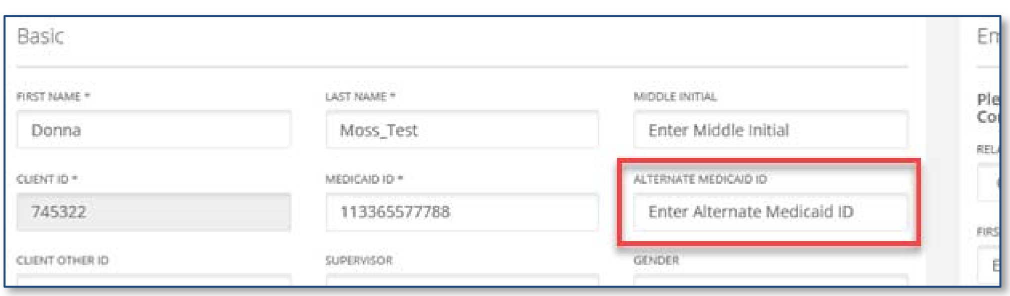


For newborn clients, while the newborn Medicaid ID is pending, the newborn number provided by the payer should be entered in Client Payer ID field within the Add/Edit Payer screen that will be shown later in the training. Once the Medicaid ID is received, it must be entered in the client record. You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

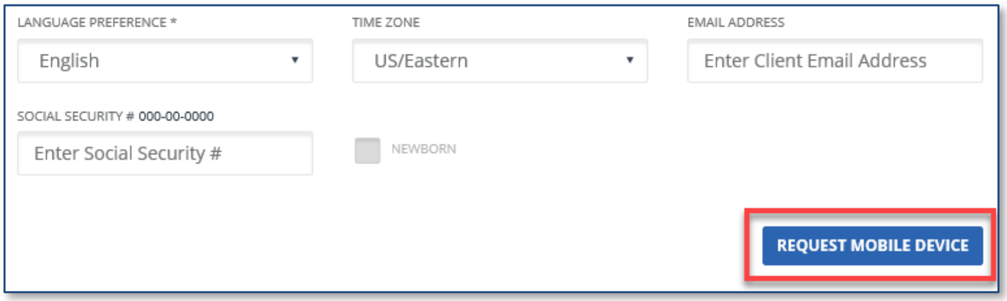
The mother's Medicaid ID should NOT be used if the newborn does not have a Medicaid ID yet.

In the event a client receives a new Medicaid ID (for example, coverage lapses or adoptions) enter the new ID in the **ALTERNATE MEDICAID ID** field.

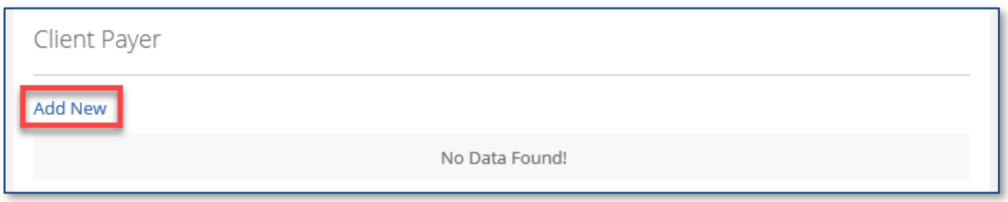
In general, any instance which causes a new Medicaid ID to be created for an individual, the new Medicaid ID should be entered in the Alternate Medicaid ID field.



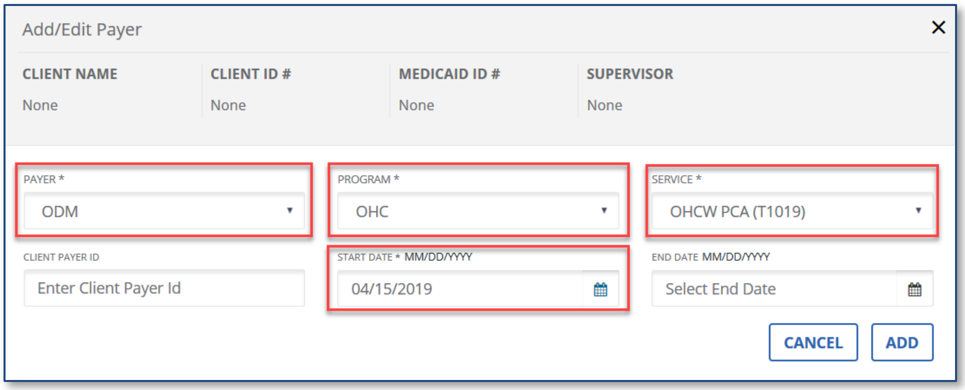
A **REQUEST MOBILE DEVICE** button is also available in the *Basic* section of the client screen to submit a request for an EVV Device for the client. This process is explained in detail in the *eTRAC & EVV Device Management* module of this guide.



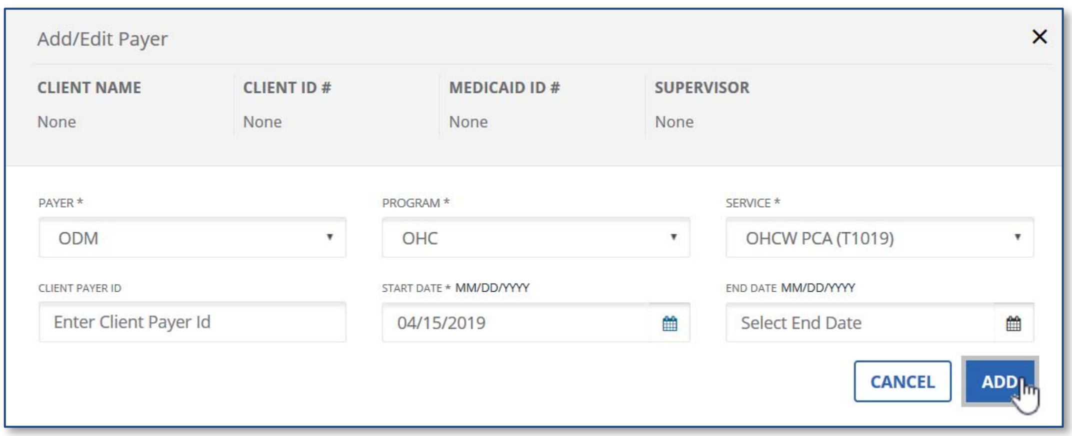
3. In the Client Payer section, click **ADD NEW** to add Payer information (required).



   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.

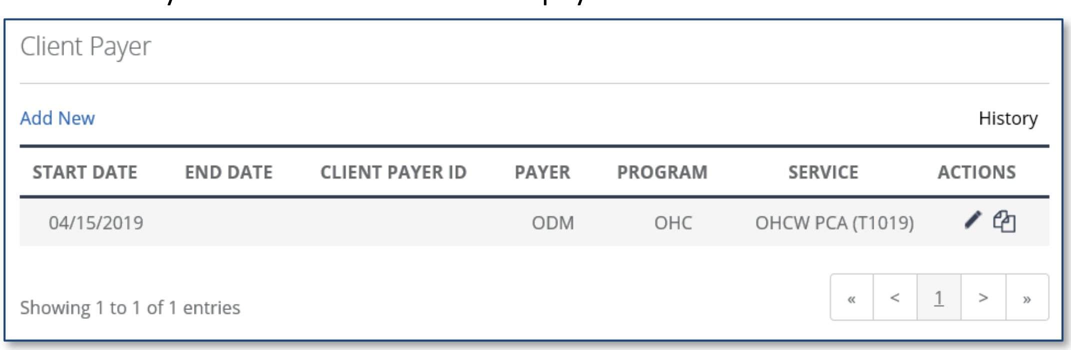


4. Click **ADD**.

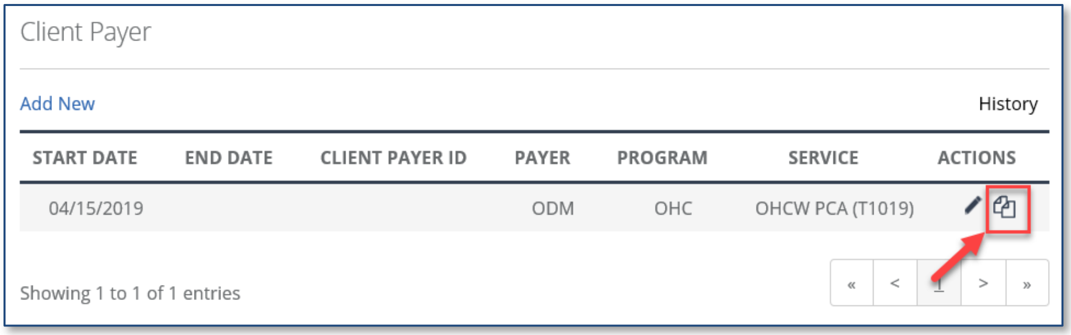


Upon clicking **ADD**, the Payer information is added to the record and the Payer fields are cleared. The Add/Edit Payer screen remains open, ready for additional payers to be entered. Click the 'X' in the upper-right corner to close the window.

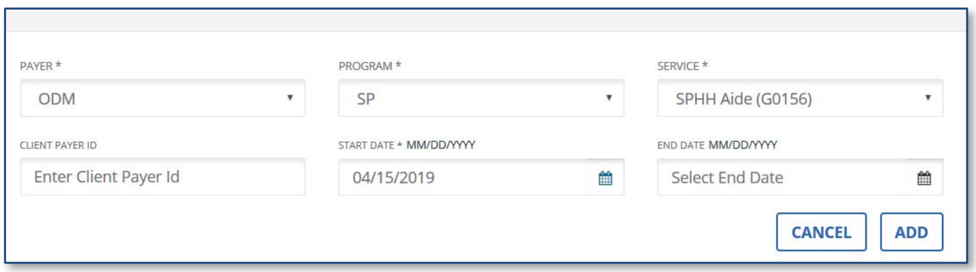
5. The Client Payer section shows the added payer.



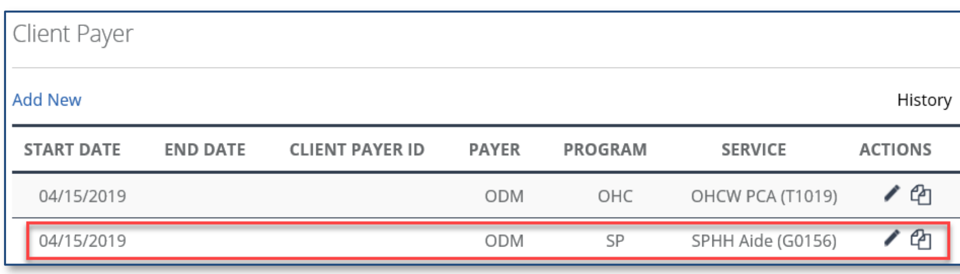
6. To add another service for the same payer or add another payer to the client, click the **Copy Payer** icon to the right of the line.



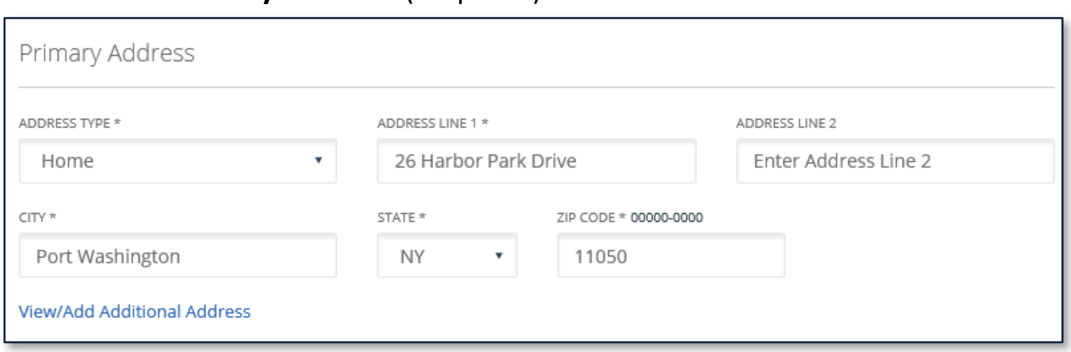
   a. Update the **PAYER**, **PROGRAM** and **SERVICE** fields as needed and click **ADD**.



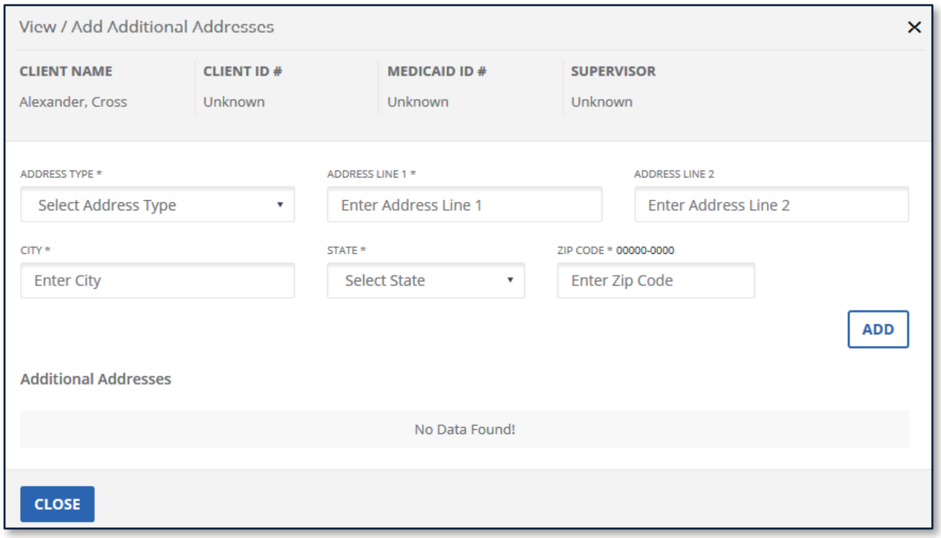
   b. The additional payer information is added to the client record.



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



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.



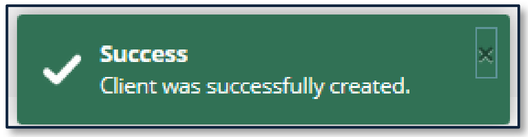
8. Select **PHONE TYPE**. Enter client's **PHONE NUMBER**. (Optional)

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.



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

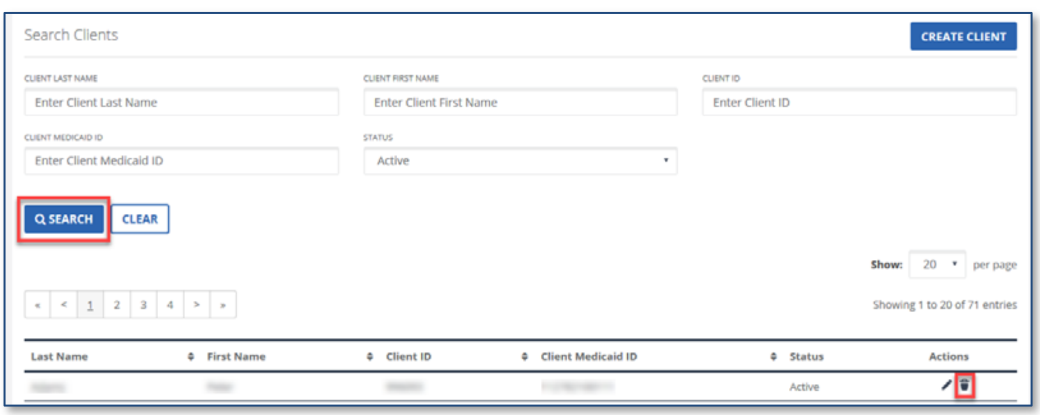
When the **NEWBORN** indicator box is checked, the Medicaid ID field becomes optional and non-editable. When a newborn client receives a Medicaid ID, the **NEWBORN** box can be unchecked, opening the Medicaid ID field allowing entry of the Medicaid ID.

Deleting Clients

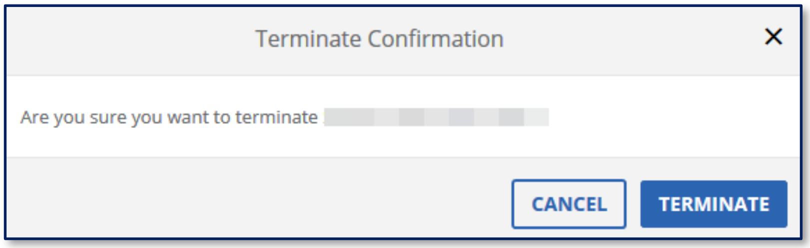
Use the **Delete** option to remove client data from Sandata EVV going forward. Deleting a client makes the record inactive. Clients cannot be deleted with a future date. Any activity already captured will continue to reference the client's previous information. When a client is deleted, no activity 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.

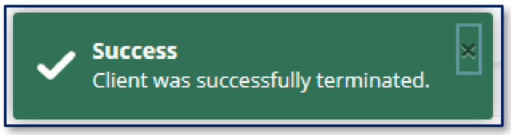
1. Search for a client.



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



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

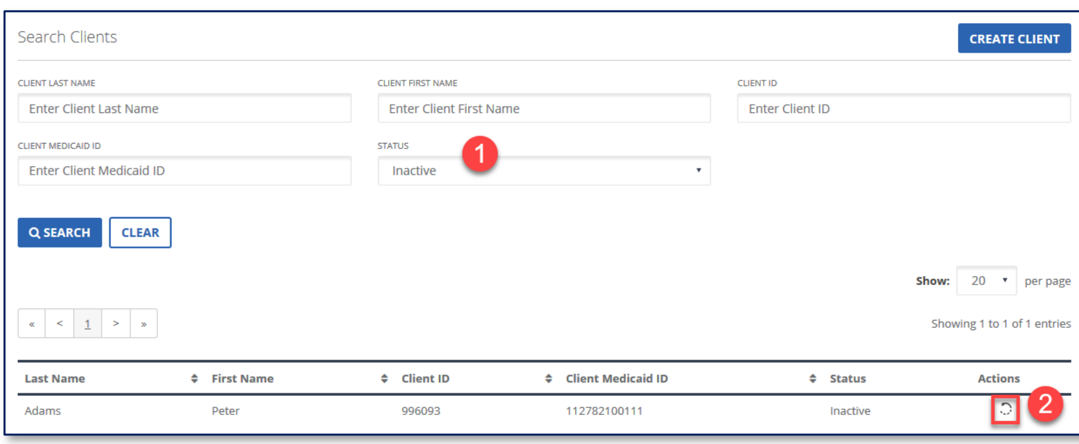


Reactivating Clients

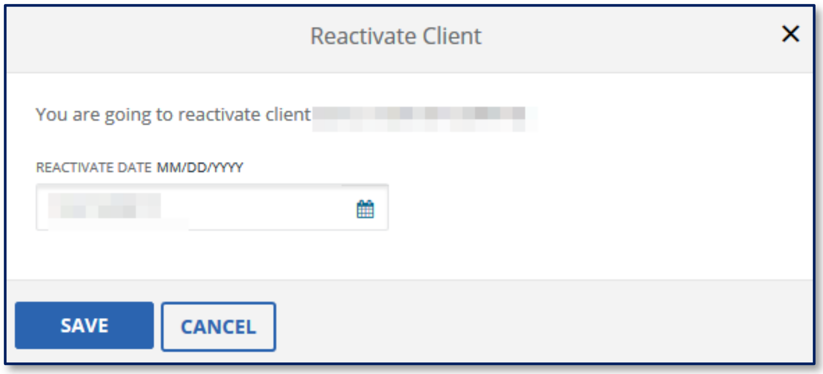
A client can also be reactivated. Search for clients with the status of **Inactive** and click the **Reactivate** button to the right of the selected client.

Watch as the instructor demonstrates how to reactivate a client.

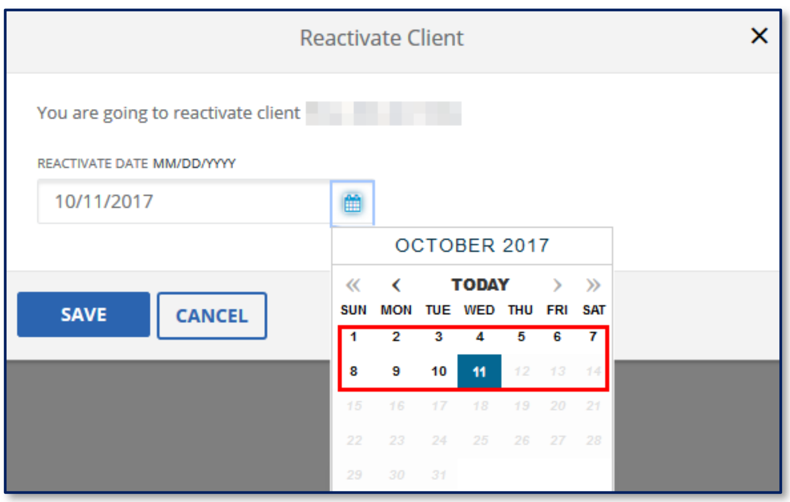
1. Search for a client with the status of **Inactive**.



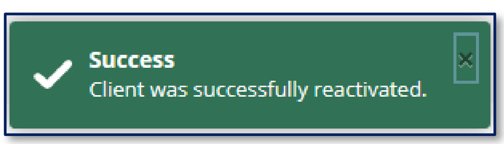
2. Click **Reactivate** (◌) to the right of the selected client's name. The *Reactivate Client* confirmation dialog box displays.



3. 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.



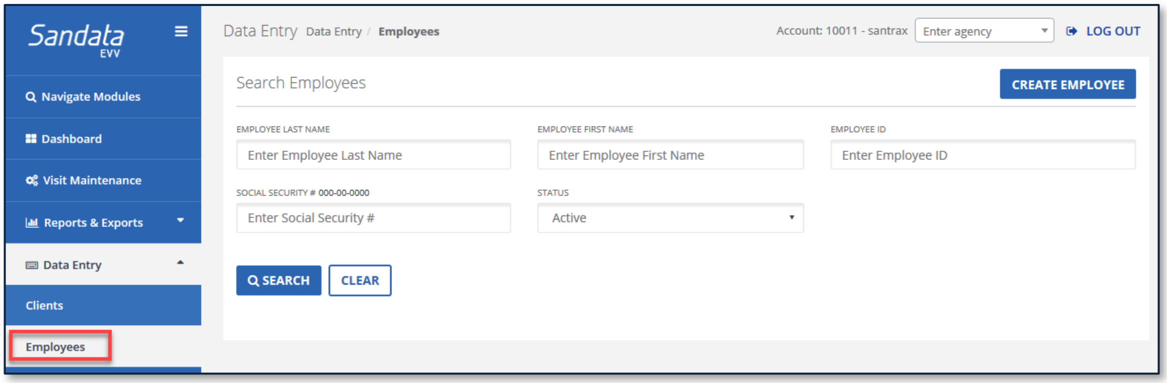
4. Click **SAVE**. A successful confirmation dialog box displays.



Exercise: Delete/Reactivate a Client

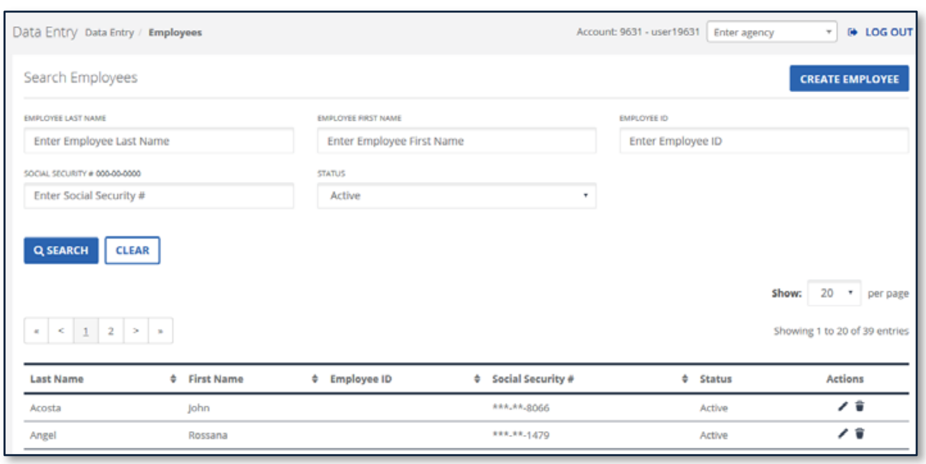
Employee Data

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.

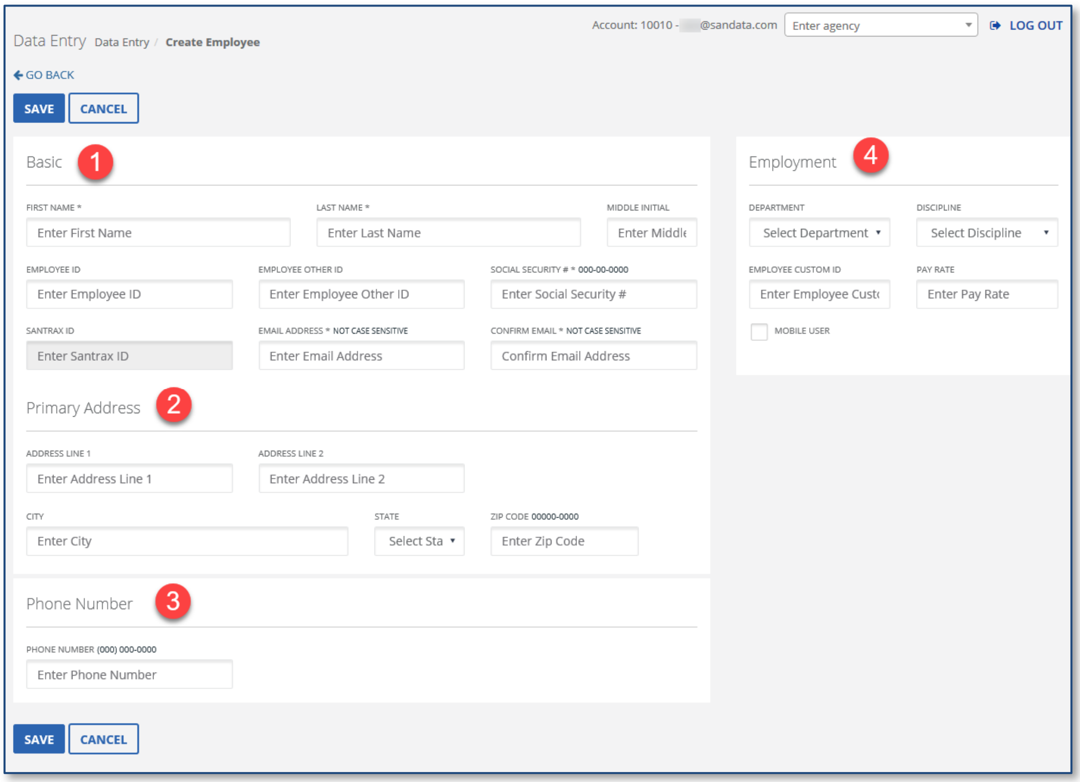


If multiple search values are entered, Sandata EVV attempts to match against all exact values entered.

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

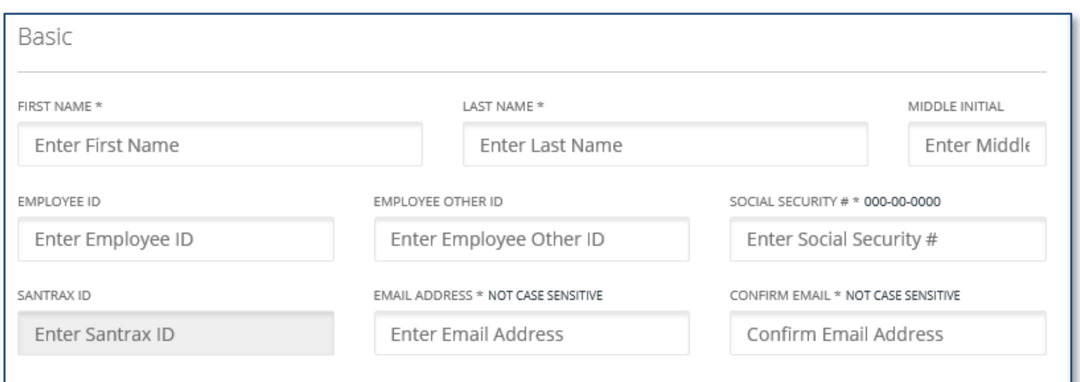
Create New Employee(s)

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.



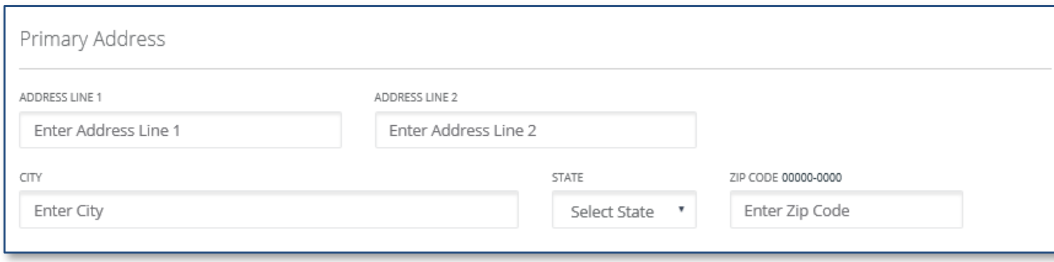
The *Data Entry / Create Employee* screen is made up of the following sections.

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

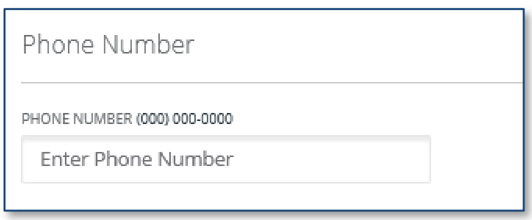


The SANTRAX ID is automatically created by the system upon saving the employee record. The SANTRAX ID is entered by the employee as their unique ID for EVV Telephony calls.

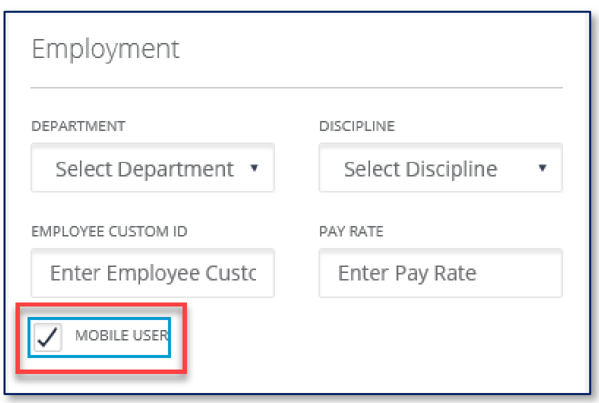
2. **Primary Address** – Address of the employee. (Optional)



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



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.

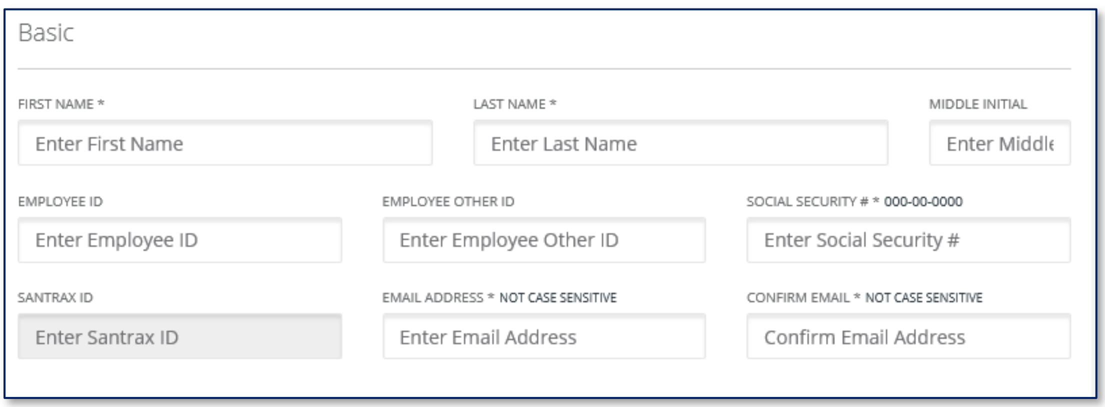


When **MOBILE USER** is checked and the record is saved, an email is sent to the employee with their temporary SMC password. The temporary password is valid for 60 days. If the temporary password expires, the employee can tap the ‘Forgot Password’ link on the SMC Login screen to reset the temporary password.

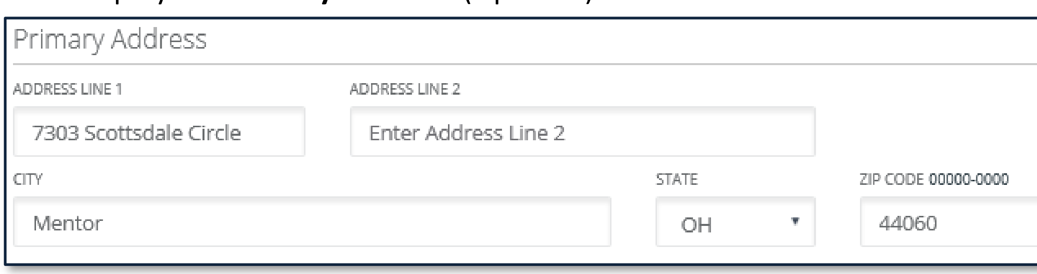
5. **SAVE/CANCEL**.

Follow along with the instructor to create a new employee.

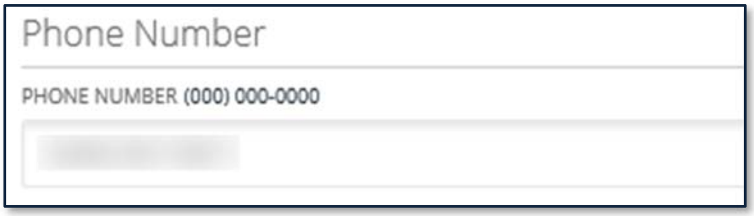
1. Click **CREATE NEW EMPLOYEE**. The *Data Entry / Create Employee* screen opens.
2. In the *Basic* section, enter **FIRST NAME, LAST NAME, SOCIAL SECURITY #** and **EMAIL ADDRESS**.



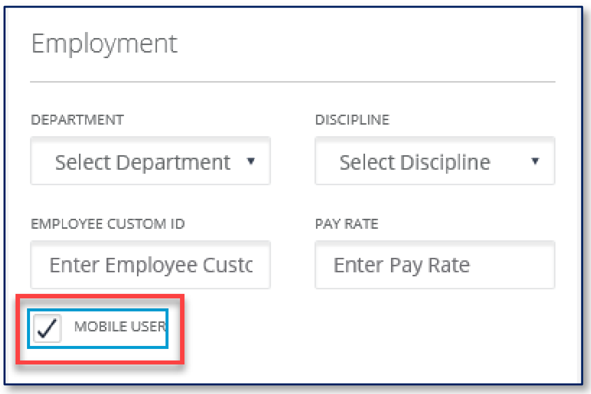
3. Enter employee's **Primary Address**. (Optional)



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

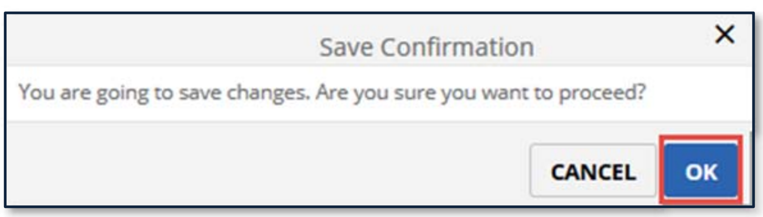


5. In the *Employment* section, check the **MOBILE USER** box.

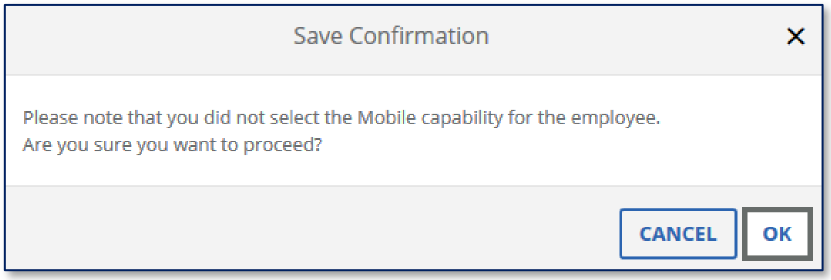


If the **MOBILE USER** checkbox is not selected, the employee cannot use SMC to record call-in/call-out times.

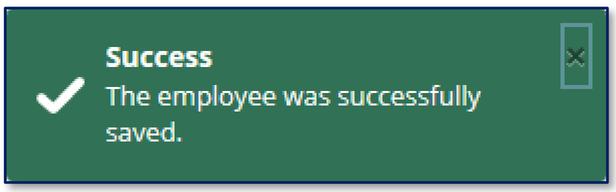
6. Click **SAVE**. The *Save Confirmation* dialog box displays.



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



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.

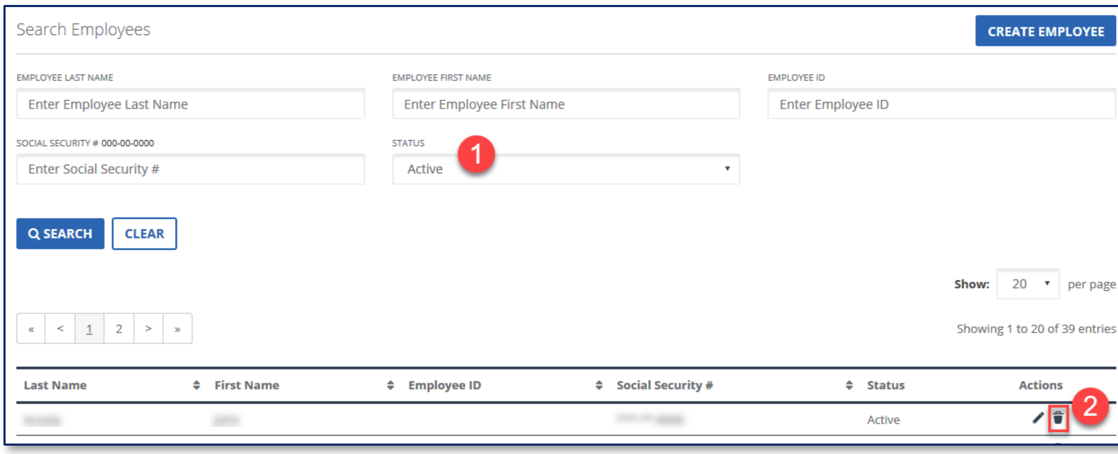
<u>Deleting Employees</u>

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.

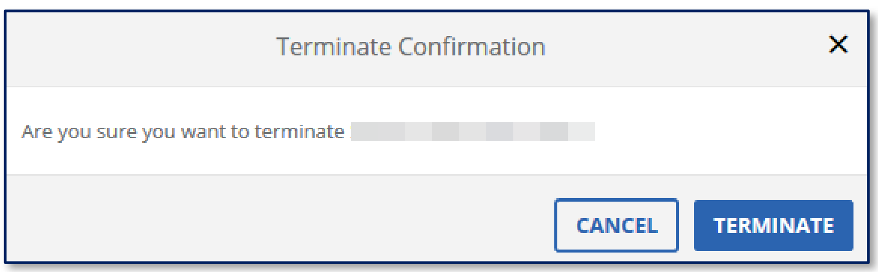
Terminating an employee is not retroactive.

Watch as the instructor demonstrates how to terminate an employee.

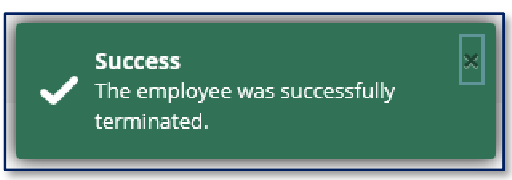
1. Search for an employee.



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.

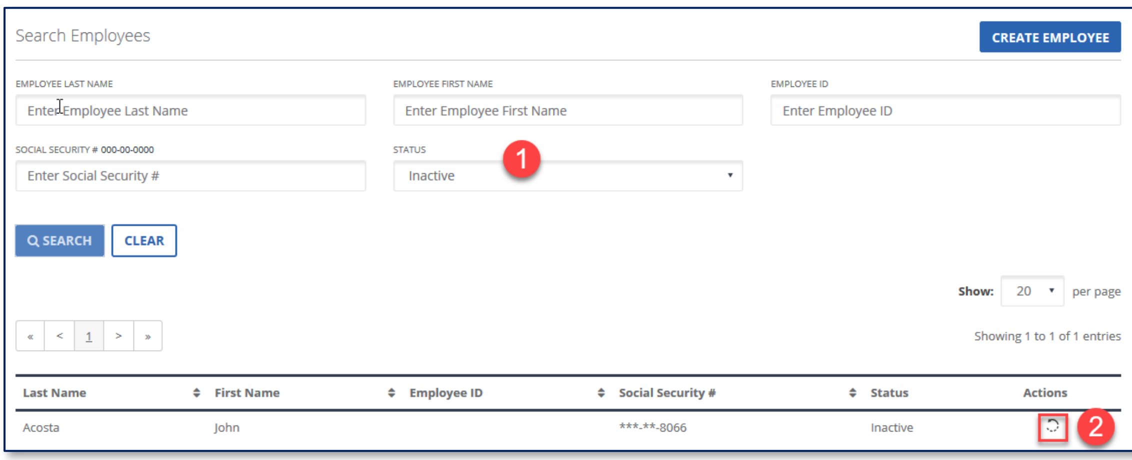


Reactivating Employees

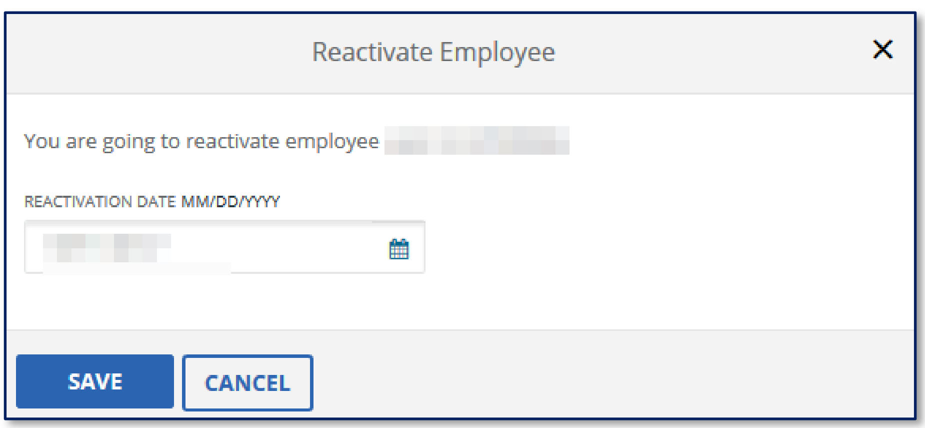
An employee can also be reactivated. Search for the status of **Inactive** and click **Reactivate** to the right of the selected employee.

Watch as the instructor demonstrates how to reactivate an employee.

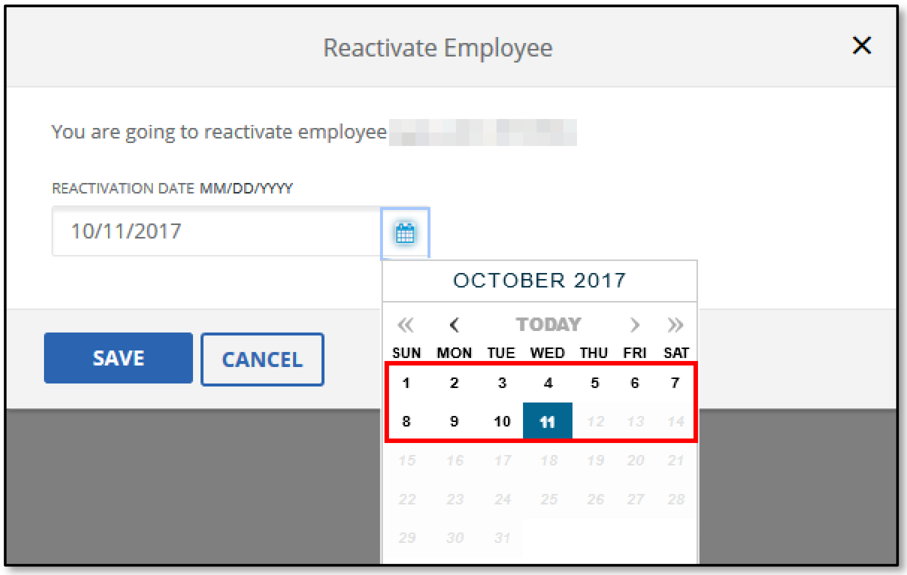
1. Search for an employee with the status of **Inactive**.



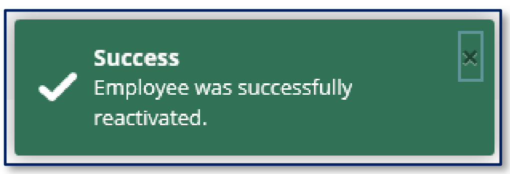
2. Click **Reactivate** (◌) to the right of the selected employee's name. The *Reactivate Employee* confirmation dialog box displays.



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.



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 a device from EVV;
  - 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. One method of ordering EVV devices is 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:

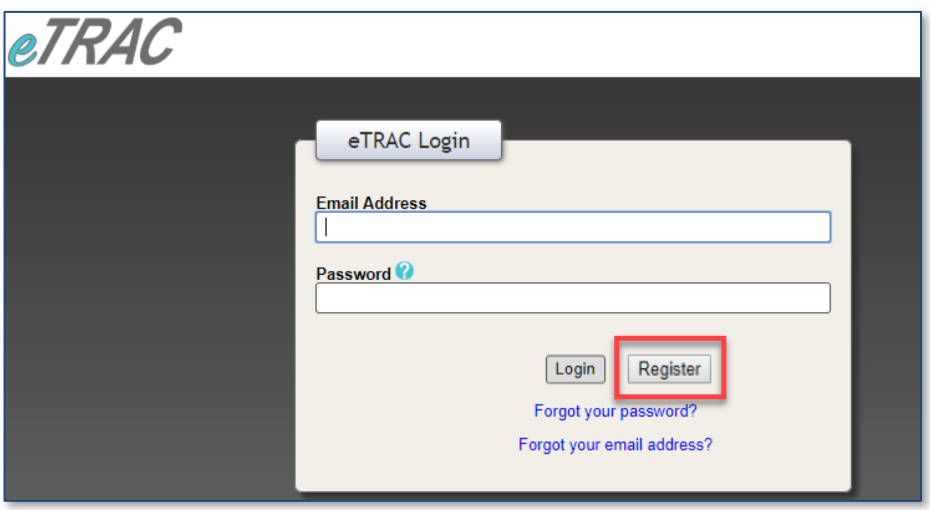
- request a device;
- view which client have had devices ordered for them;
- view tracking information for devices that have already been requested; and
- report end of care of a client.

Registering as a Provider in the eTRAC Portal

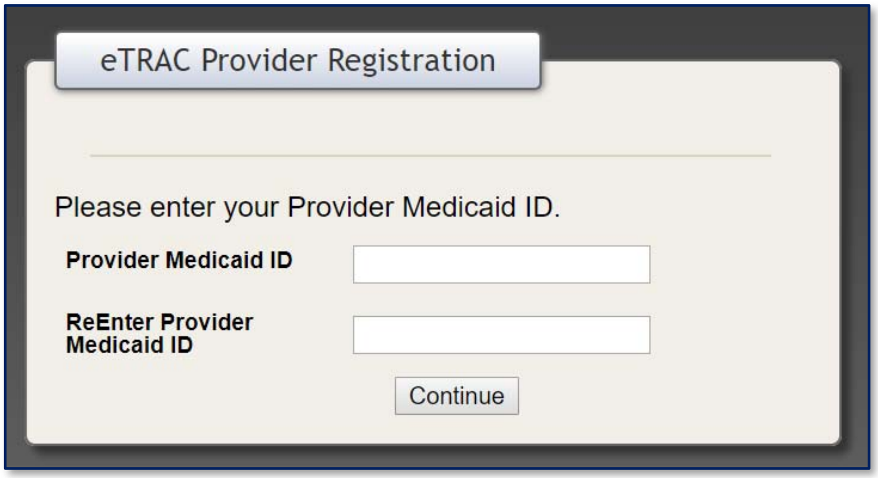
How to Register

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

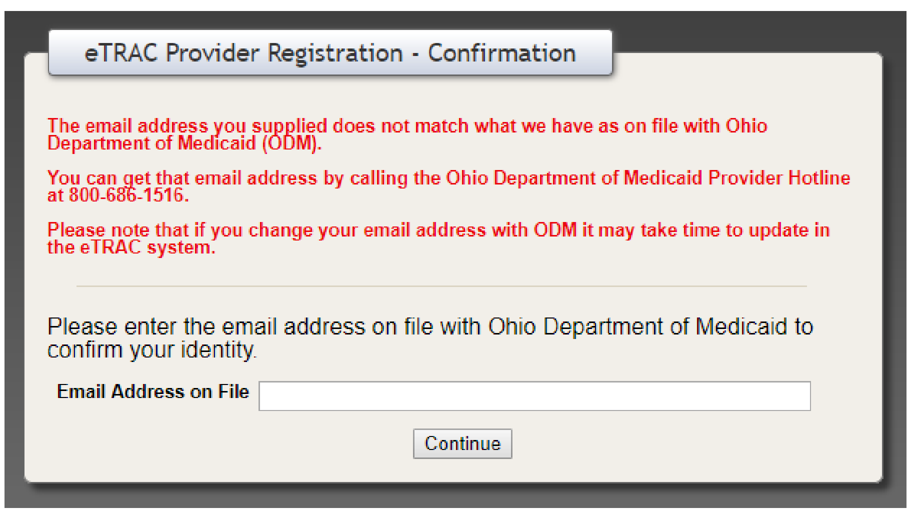
1. Click **Register,** when on the eTRAC website.



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

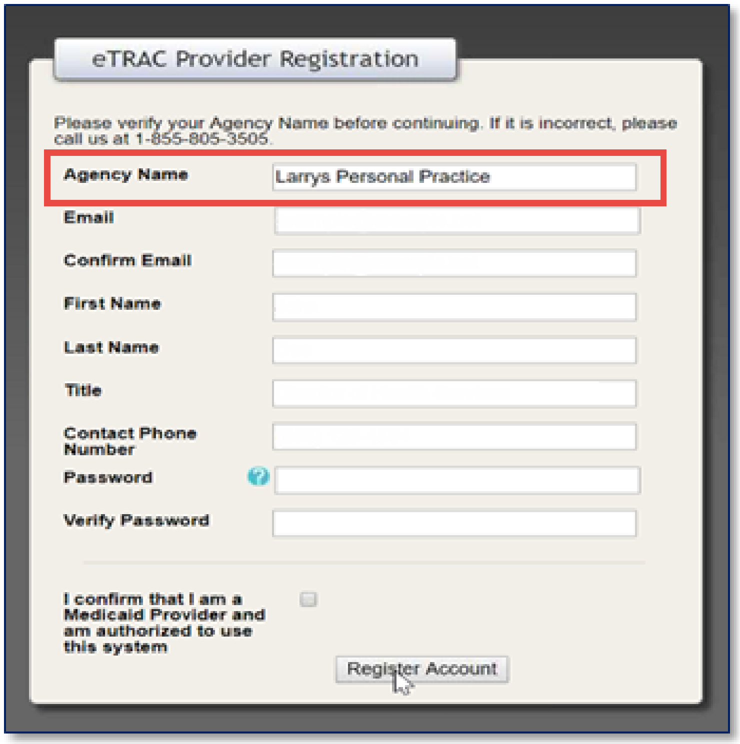


3. Enter the email address on file with the Ohio Department of Medicaid (ODM), that matches your entered Medicaid Provider ID. If the email address you enter does not match what ODM has on file, you will see the message displayed in **red** in the screenshot below. If you see this, please call ODM at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



The 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.



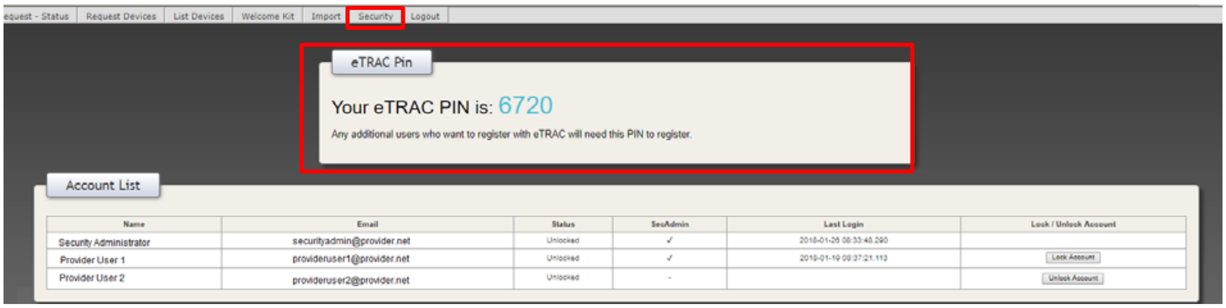
Remember, password requirements are minimum of 12 characters with 1 number, 1 capital letter and 1 lowercase letter.

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

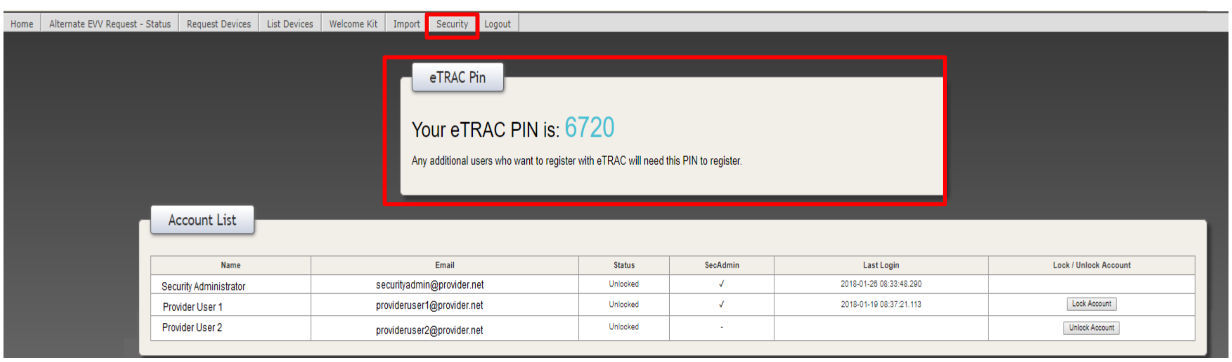
The first person to register for an account for a Provider ID in eTRAC will become that Provider ID's *Security Administrator* in eTRAC. The Security Administrator will see a **Security tab** in eTRAC.



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.



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.

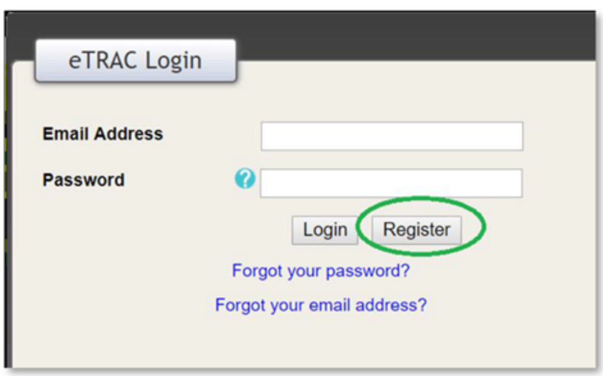
The Security Administrator also has the ability to unlock or lock an account under their Medicaid Provider ID. For example, if an account becomes locked in eTRAC because login attempts are exceeded, the Security Administrator can go to the Security tab and click the “Unlock” option to the right of that 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.

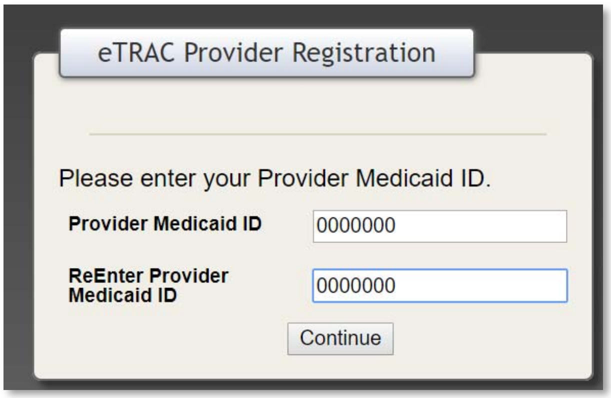
Registering Additional Users in eTRAC

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

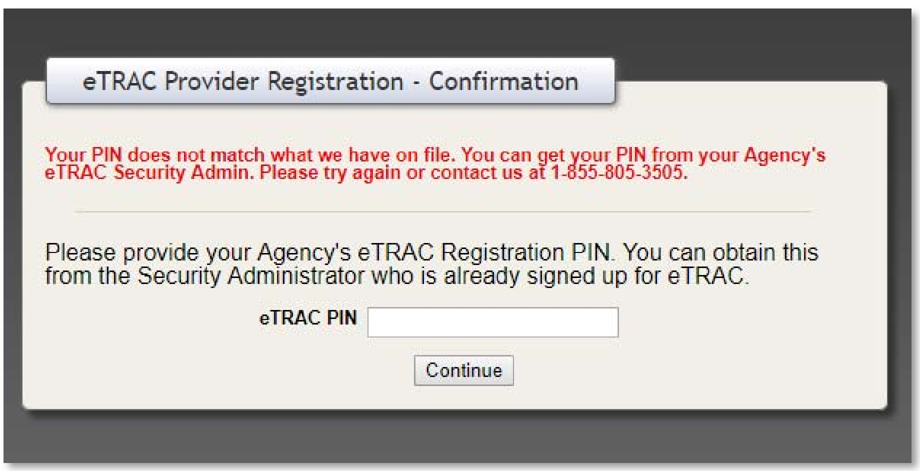
1. Use the following URL to access the eTRAC Portal: https://etraconline.net/login**.** When on the eTRAC website, click **Register.**



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:



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

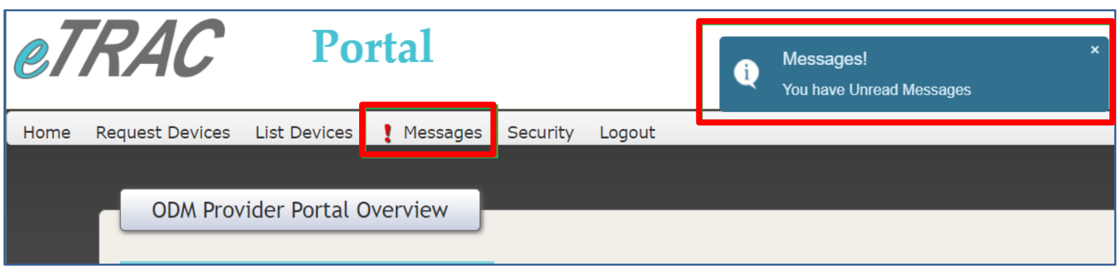
After successfully registering in the eTRAC Portal, click **Login** to use the portal to manage devices.

Messaging in the eTRAC Portal

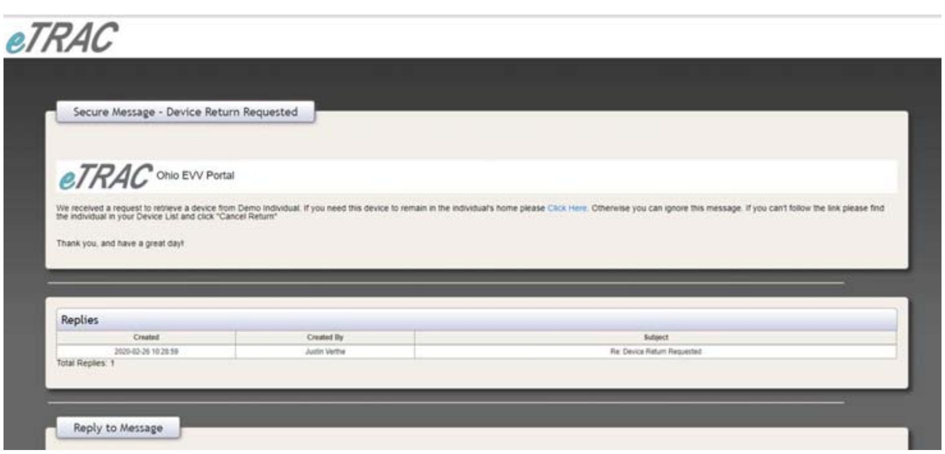
Etrac will display system or device related messages only. Any other technical assistance needed not related to eTrac should go through the EVV Provider Hotline.
Here's how it works:

1. When you have a new message in eTRAC, you will receive an automated email notification that there is a new message to read in eTRAC, like this:

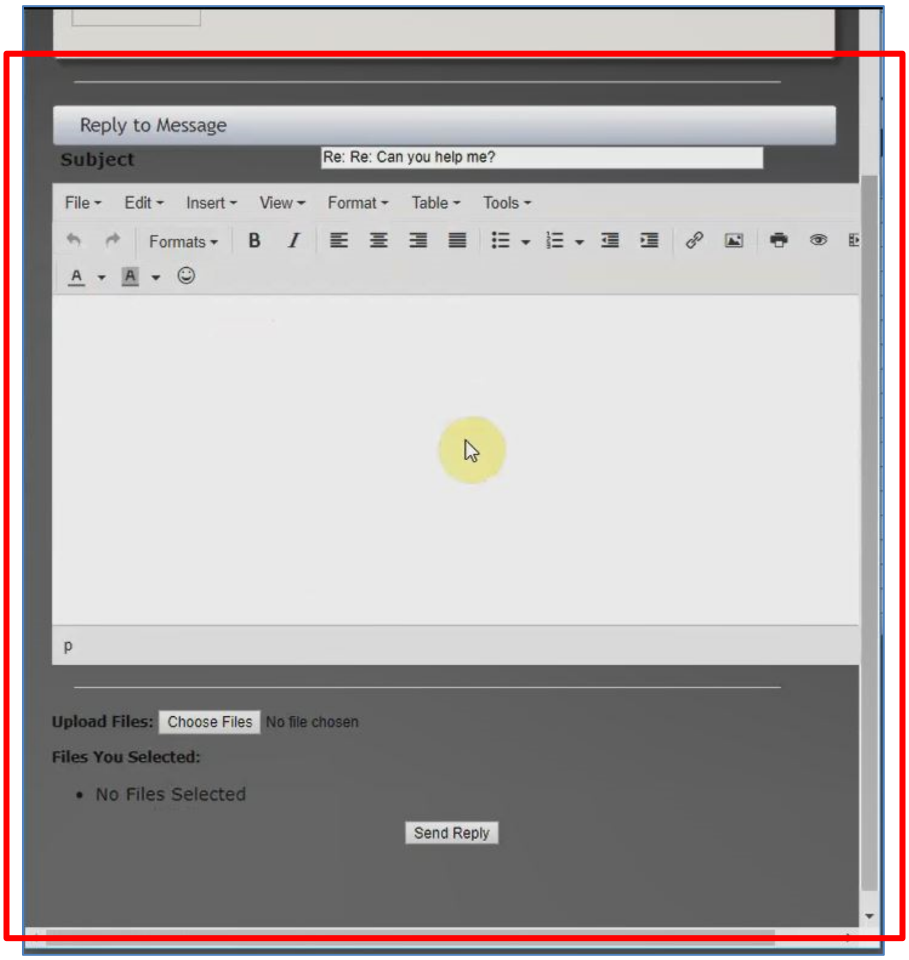
2. You can then log into eTRAC to see your message. Locate the ***Messages*** tab to read and respond to messages from the EVV Provider Hotline. When you have a new message, there will be a pop-up message on every tab that you select in eTRAC, letting you know that you have a message. You will also see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



3. **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.



4. 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.



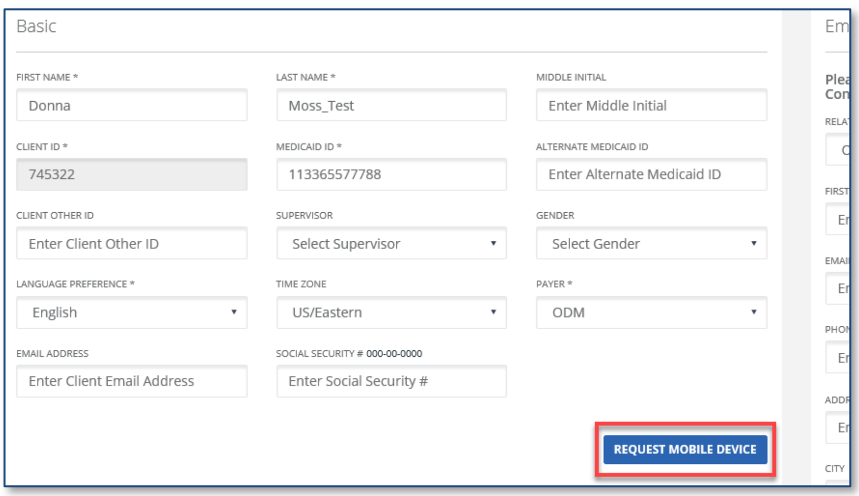
Requesting Devices

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 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.



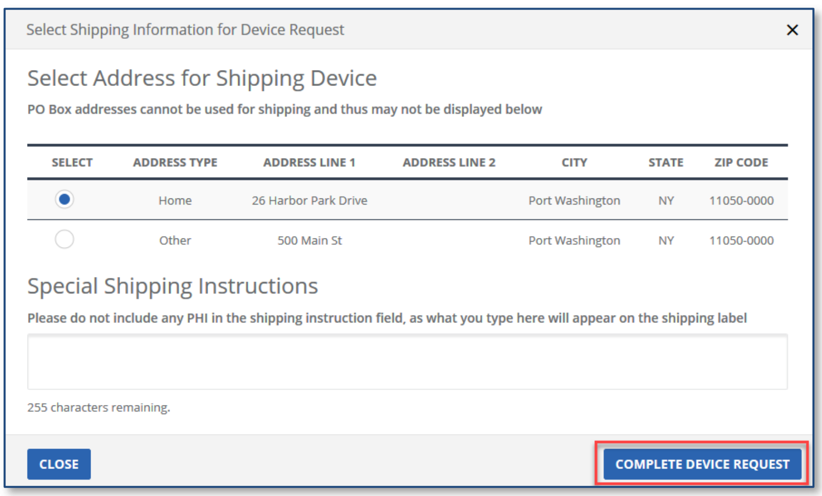
Ordering EVV Devices for Clients with PIMS and Newborn IDs

When ordering a device in eTRAC, use the Medicaid ID. If you do not have a Medicaid ID for the client, you should use one of the following options:

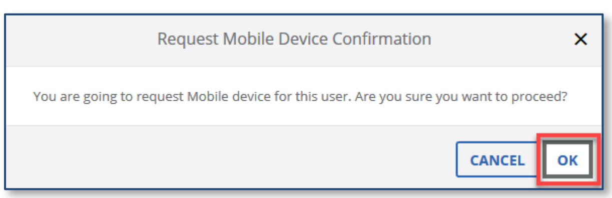
- **PIMS (ODA clients):** Enter the following information in the Medicaid ID field. Add enough 0's at the end to make a 12-digit entry:
  - Start with: P+PIMS ID+0's
  - Example: If the PIMS ID is 1234567, you would enter "P12345670000"

- **Newborn IDs:** Devices for newborn clients without Medicaid ID's can be ordered in eTRAC or EVV. Enter the following information in the Medicaid ID field. Add enough 0's at the end to make a 12-digit entry:
    - Start with: EVV Acct # + N + EVV Generated Client ID + 0's
    - Example: If the EVV Acct # ID is 6789 and the EVV Generated Client ID is 985456, you would enter "6789N9854560"
    - If the Newborn ID is greater than 12-digits long, you must request the Device from EVV.

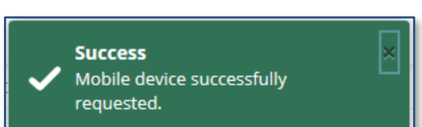
4. Select or confirm the Shipping address (If the client has multiple addresses, the primary address is selected by default). Enter special shipping instructions into the text box if needed (e.g. please go to side door).



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



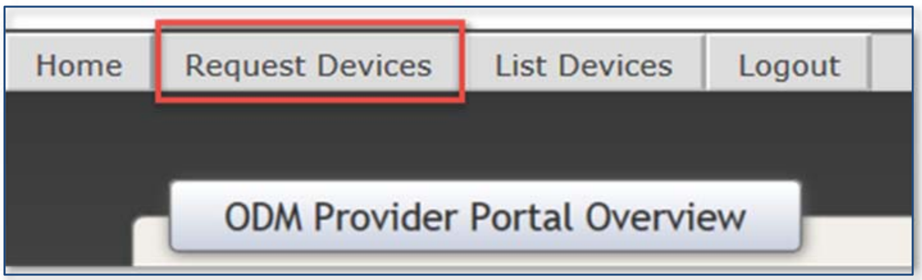
7. A Success message appears at the top of the screen.



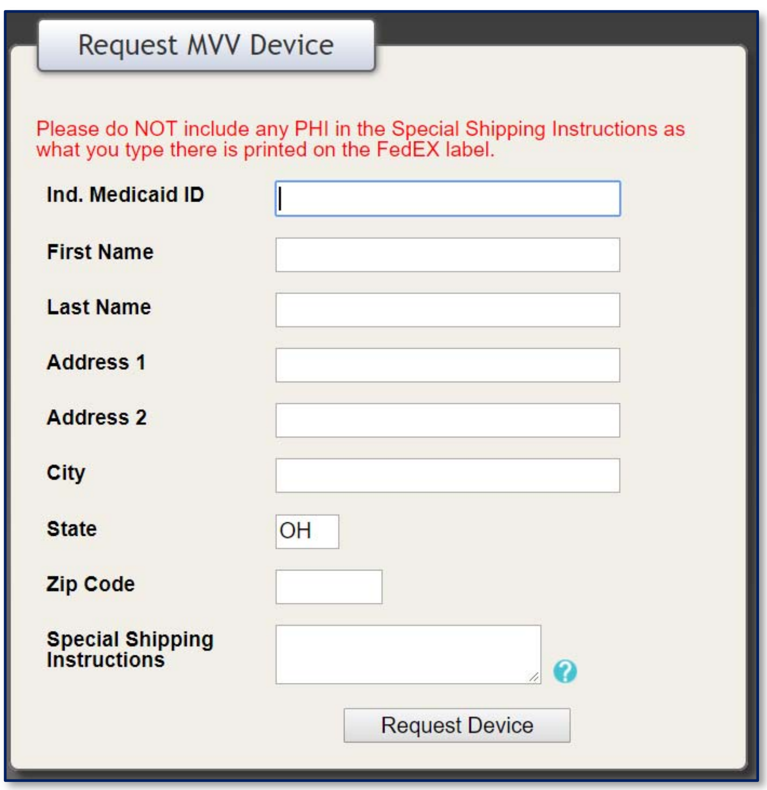
Requesting a Device in eTRAC

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.



- **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.

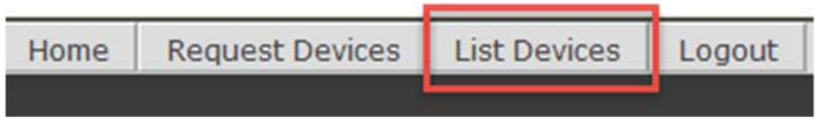
3. Click **Request Device**, when finished filling out the fields. The *Request EVV Device* screen displays again with all entry fields blank.

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.

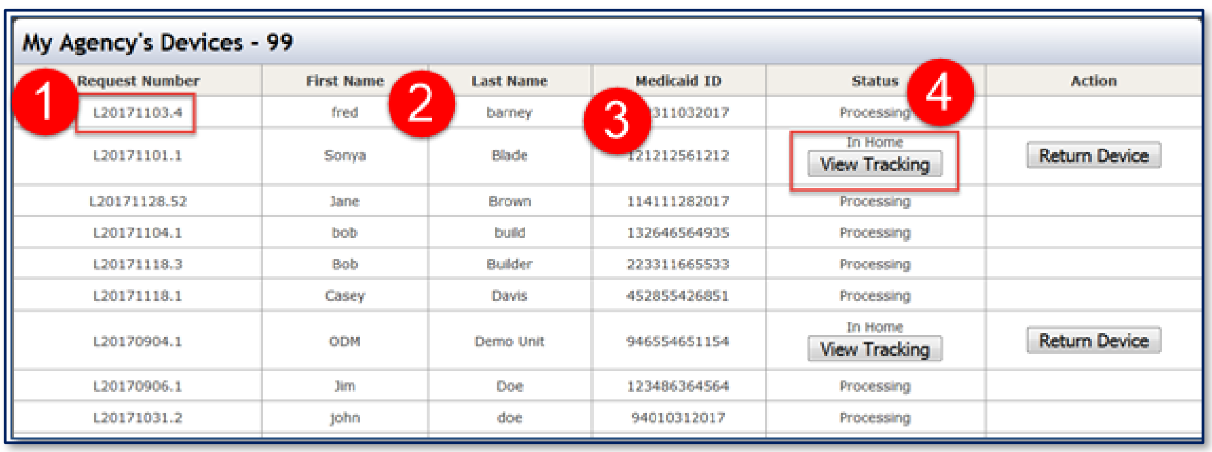
Viewing Device Information

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	21212561212	In Home View Tracking	Return Device
L20171128.52	Jane	Brown	114111282017	Processing	
L20171104.1	bob	build	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	

1. **Request Number:** This is the logistics ticket number that is displayed in blue upon successful completion of the device request.
2. **First Name and Last Name:** This is the first and last name of the client for whom the device was requested.
3. **Medicaid ID:** This displays the Medicaid ID that has been entered for the client.
4. **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,
- the client has expired,
- the device is not needed, because the provider is using an alternate EVV system, and
- the provider is using SMC, so the device is not needed.

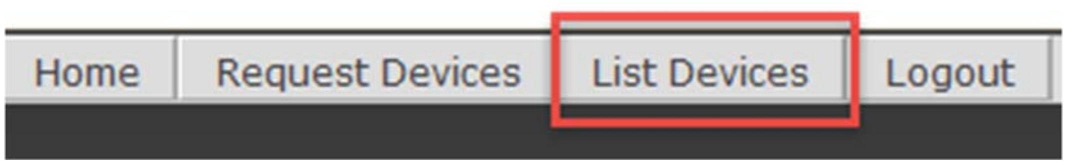
Email Confirmations

- 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.

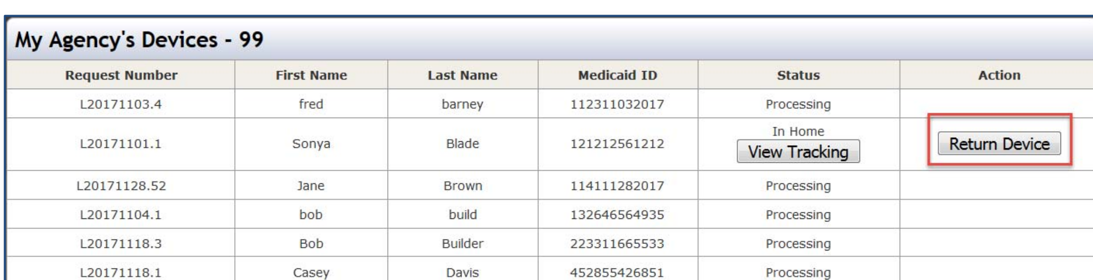
To return an EVV Device for any reason other than the four listed above, please contact the EVV Provider Hotline.

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.

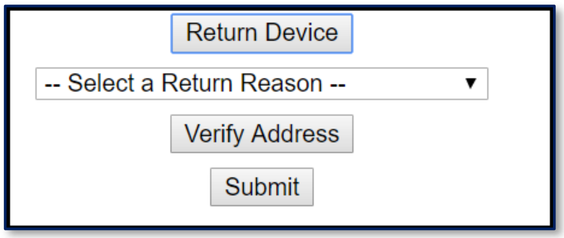


My Agency's Devices - 99

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	Builder	223311665533	Processing	
L20171118.1	Casey	Davis	452855426851	Processing	

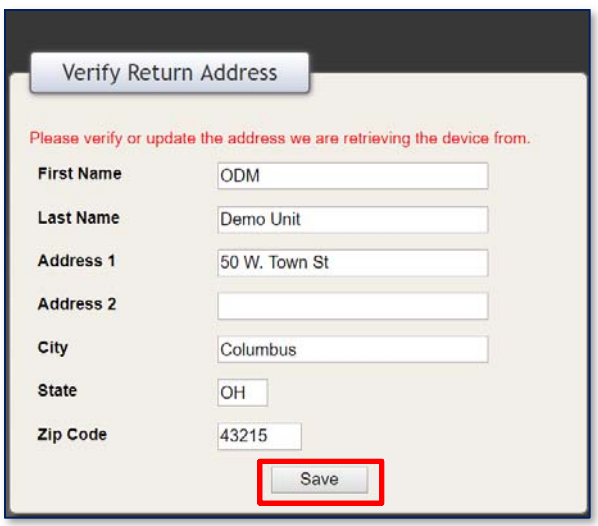
Although the button is named **Return Device**, the provider is actually reporting a reason that the EVV Device is no longer being used to record visits to a client.

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

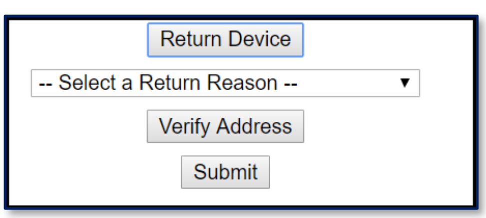


The list is an example of possible reasons and not necessarily all-inclusive. The EVV Device can be returned for any reason. If the EVV Device is being returned for a reason other than what's listed, please call the EVV Provider Hotline.

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



5. Click **Save** to close the *Verify Return Address* pop-up screen.
6. Click **Submit.**



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.

Sandata Mobile Connect

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 calling 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

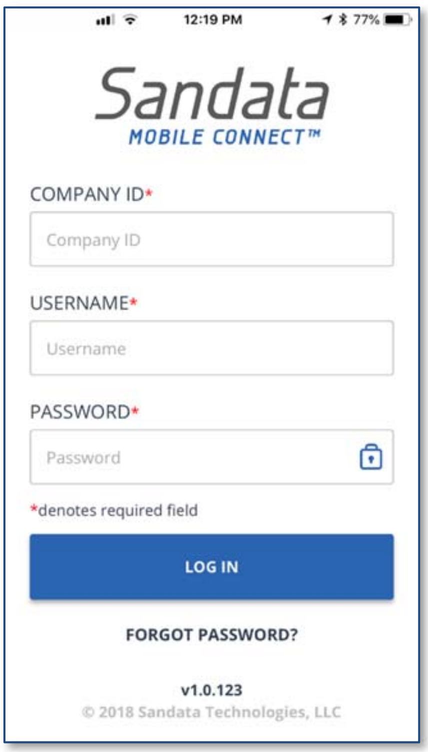
When these values are captured and the employee record is saved, Sandata EVV generates a temporary SMC password and emails it to the employee at the email address entered.

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:

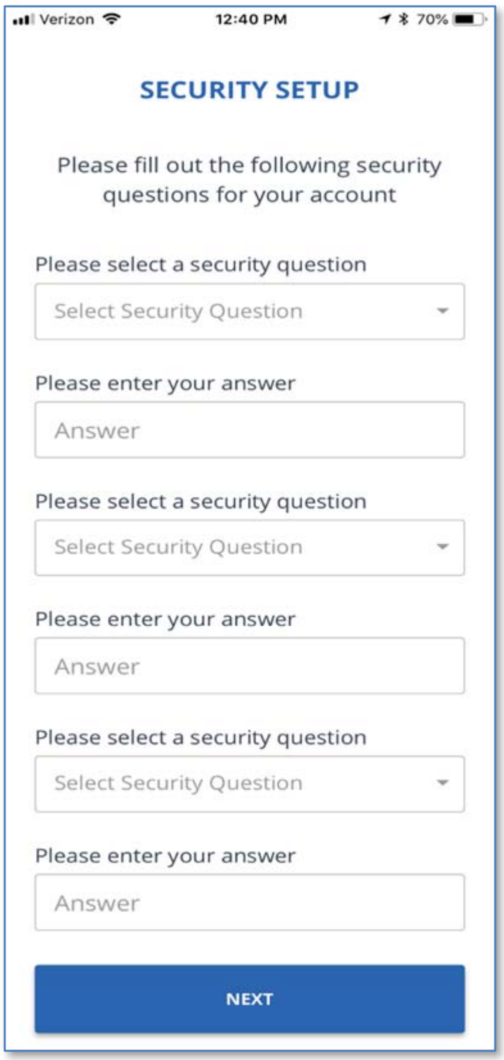
- **Company ID:** *2-Sandata account #* (always the number 2 plus a dash and the agency provider's assigned Sandata account #. Example: 2-20101).
- **Username:** employee's email address.
- **Password:** the temporary password emailed to the employee's email address entered when creating the employee.

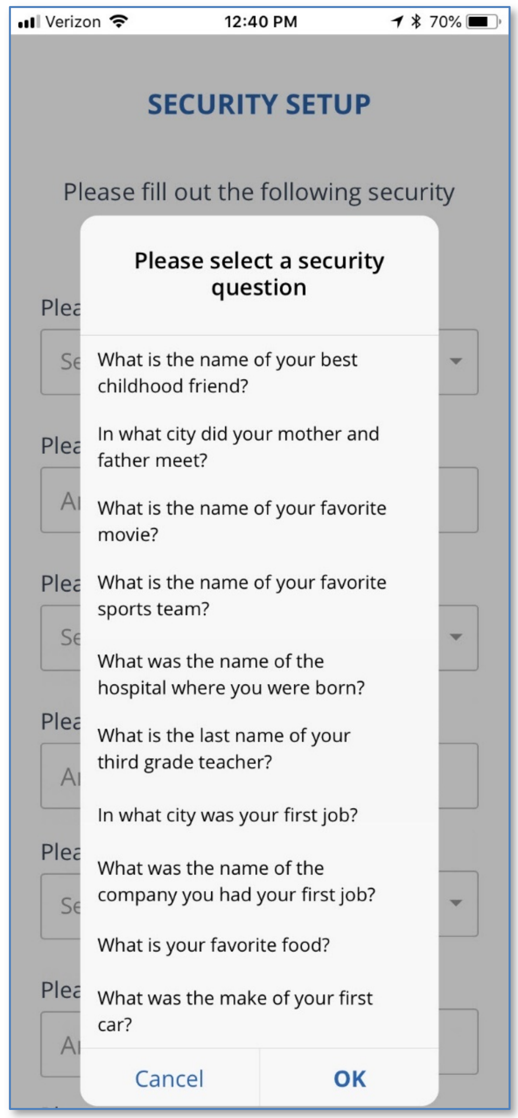


Tapping the lock icon in the **PASSWORD** field displays the password. Displaying the password can help with log-in and password entry.

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

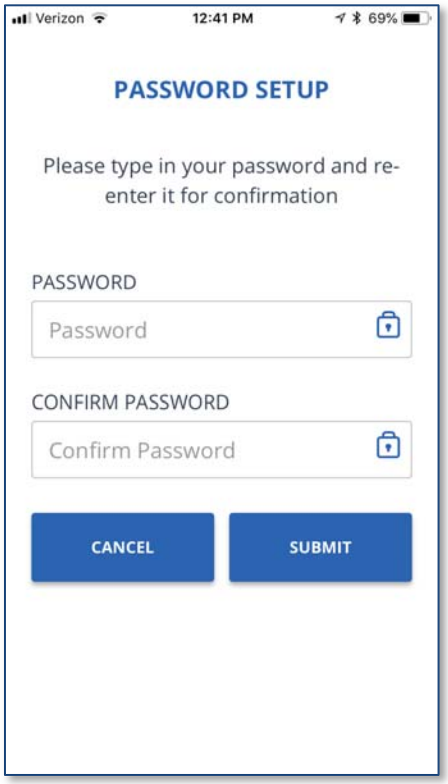
Upon logging in to SMC for the first time, the employee is asked to select and define answers to a set of security questions.





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 answerr the selected security questions.

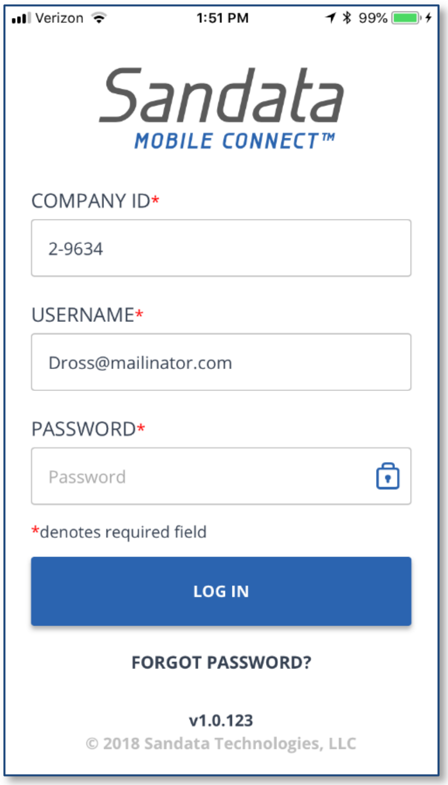


1. Enter the **New Password**.

TIP Passwords are **case sensitive**. They must be at least twelve 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.

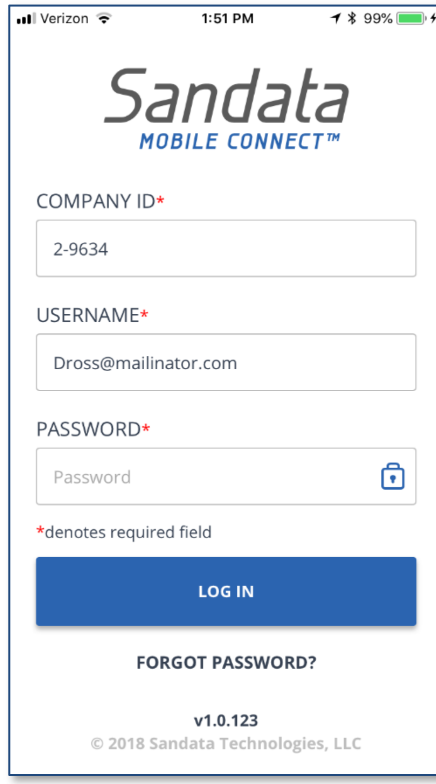


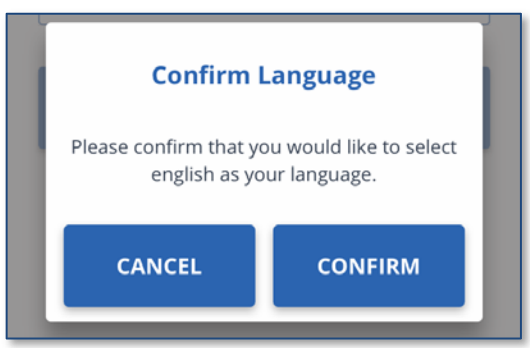
The Login screen displays. The employee uses the new password at the next login.

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



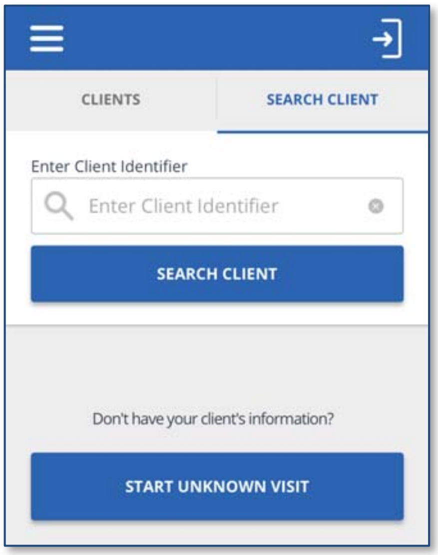


After confirming the language preference on the device, the *Home* screen displays.

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

Navigating the Home screen

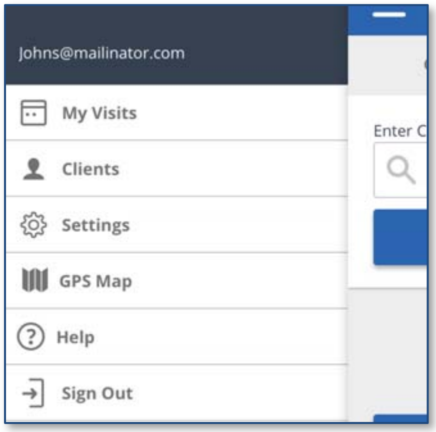
Upon successfully logging in to SMC, the user is presented with the *Home* screen. From this screen, the user is able to:



- **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:

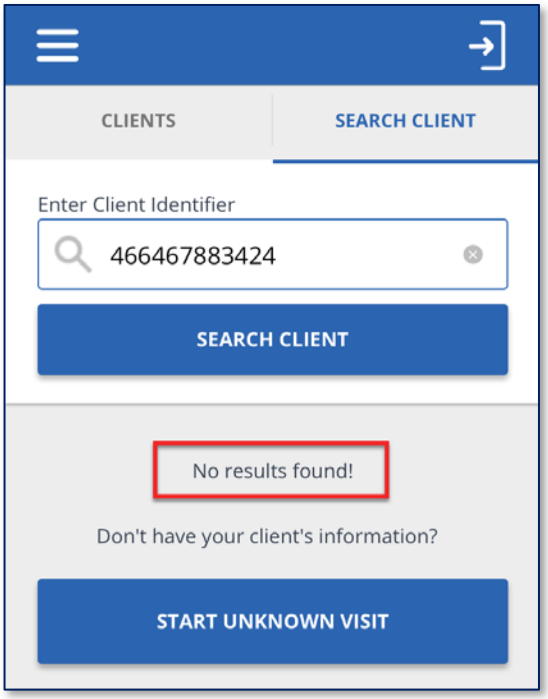
1. Locate the EVV Device or their personal device.
2. Log in to SMC.
3. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID or EVV system generated Client ID of the client.

Starting an Unknown Visit

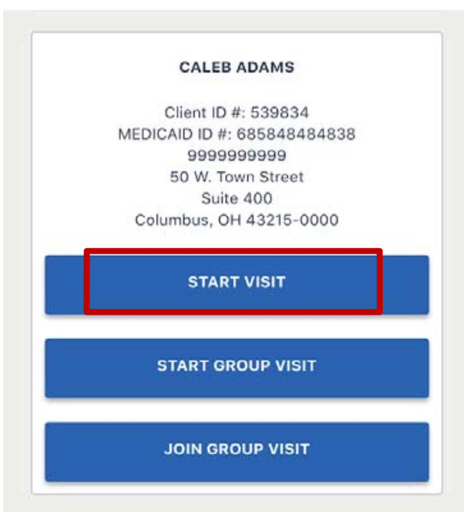
If the Medicaid ID entered is not found, the employee can still call-in and out by starting an unknown visit.

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

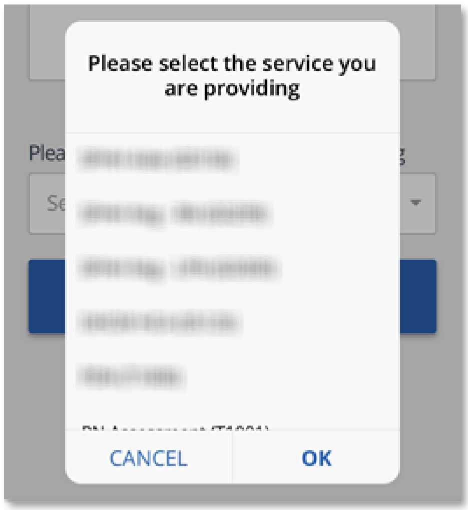
4. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any client, a “No results found” message displays).



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

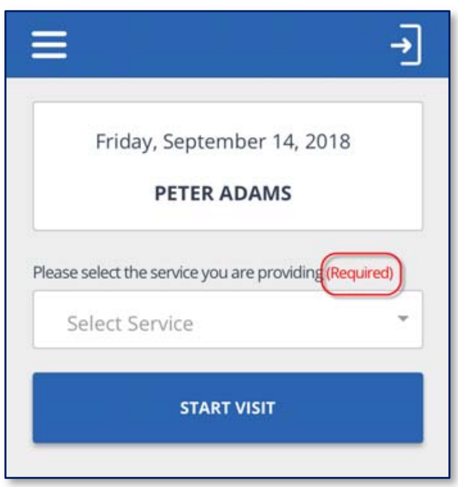


6. Select the *Service* from the drop-down list. (The list is based on the current services from the Payer section of the client record in Sandata EVV.) Tap **OK**.

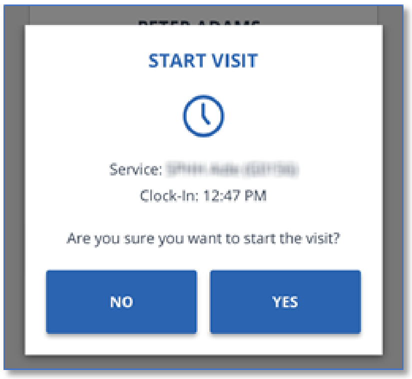


Service Selection Note

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. Tap **YES**.

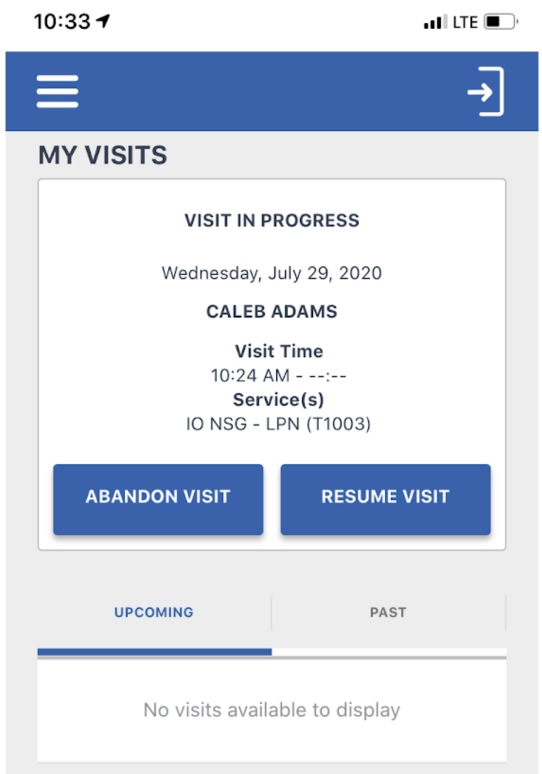


8. Log out of the SMC and proceed with providing care.

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

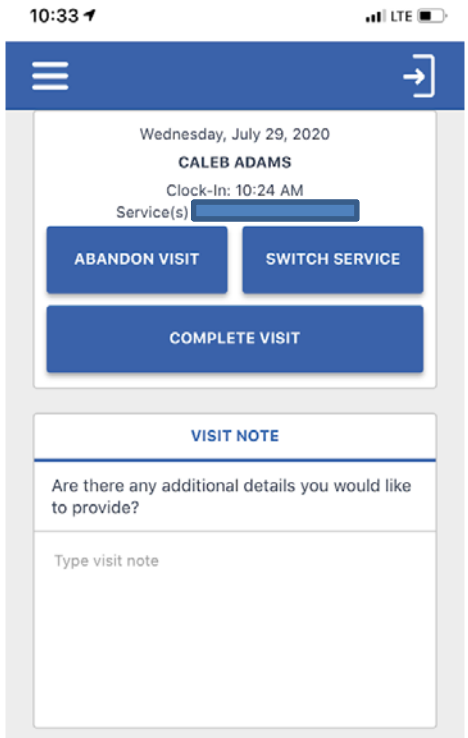
1. Log in to SMC. The *Home* screen shows the visit is in progress. Tap **RESUME VISIT**.



ABANDON VISIT button

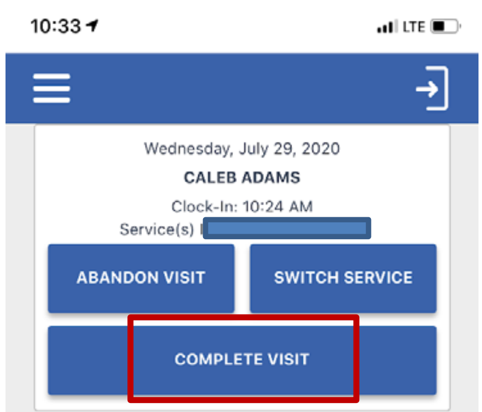
The **ABANDON VISIT** button allows the in-progress visit to be stopped so that a new visit can be started. This is used in cases when the visit was completed but the employee forgot to call-out. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

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

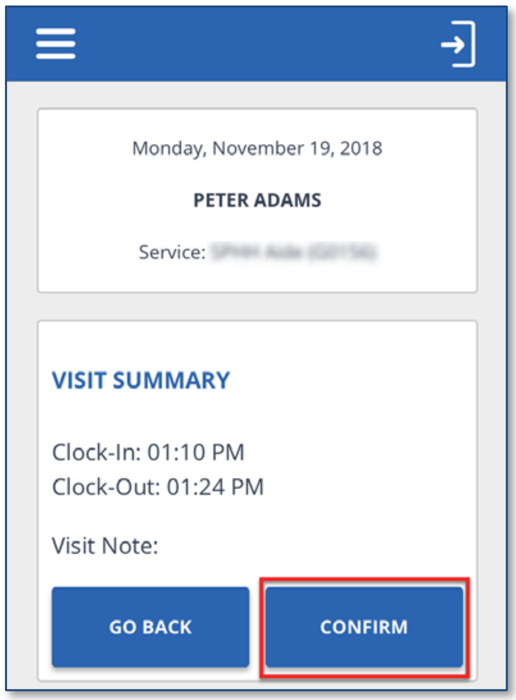


Please be aware that notes will never be required. This **Visit Note** field should **not** be used to capture clinical data, PHI or satisfy ODM documentation requirements. This **Visit Note** field should **not** be used to capture any clinical data.

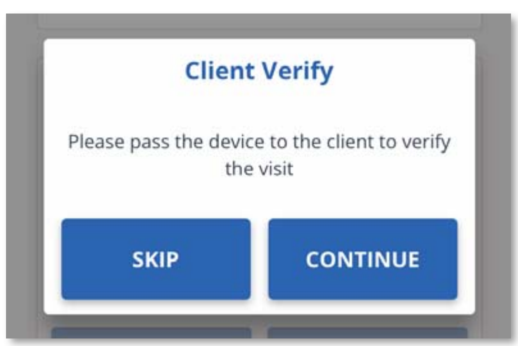
3. Tap **COMPLETE VISIT**.



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**.

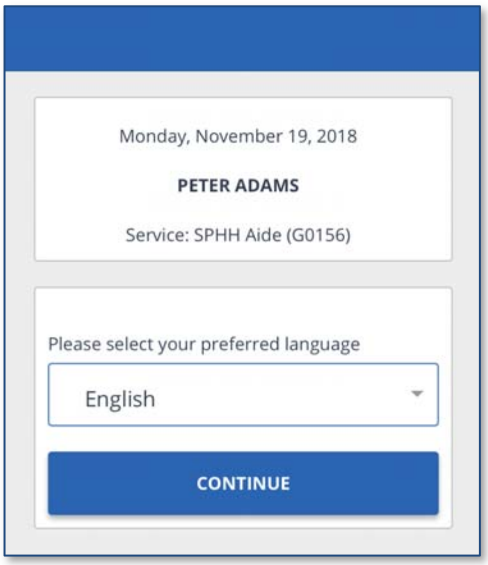


The **SKIP** button allows the in-progress visit to be completed when the client is not willing or able to verify the visit. This visit appears in Sandata EVV as an exception and must be verified in *Visit Maintenance*.

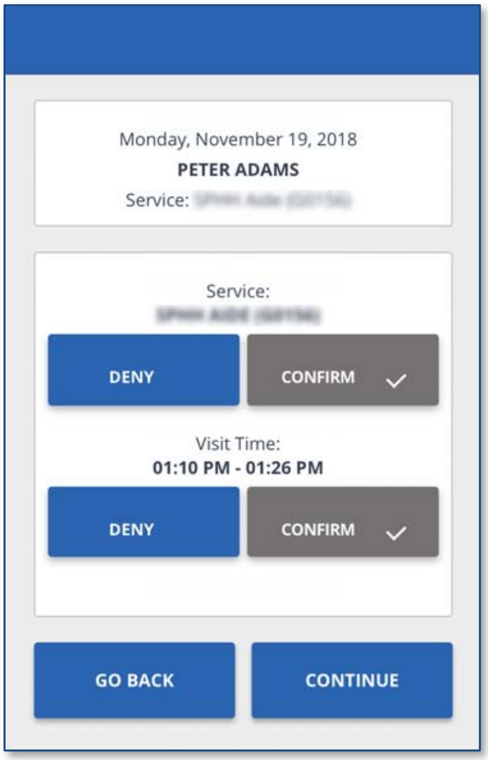
The following steps are completed by the client.

For DODD clients, the client is not required to submit a signature or voice verification. 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**.



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



Client Confirmation

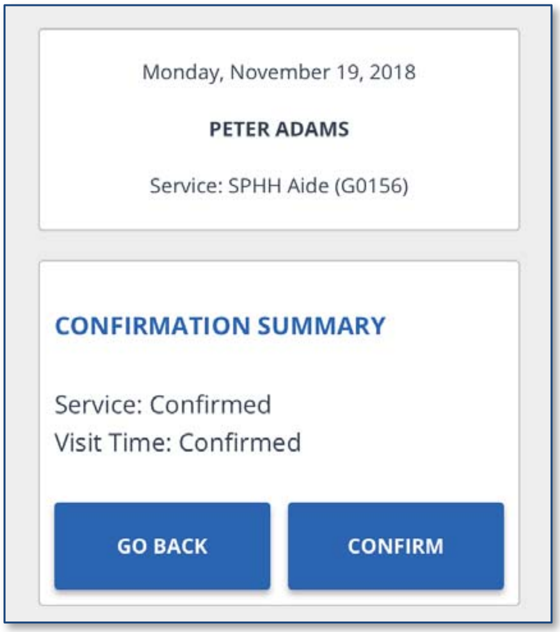
The client cannot bypass the confirmation screen; they must choose **CONFIRM** or **DENY** for each item before the **CONTINUE** button is enabled.

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*.

Confirming Multiple Services

If multiple services were provided during a visit, the client must **CONFIRM** or **DENY** all services at the end of the visit.

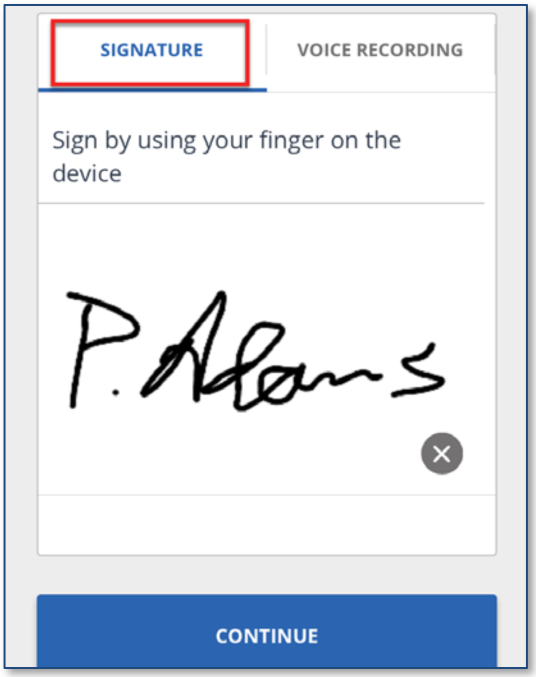
8. The *Confirmation Summary* screen displays. Tap **CONFIRM** (Tapping **GO BACK** returns the user to the previous screen).



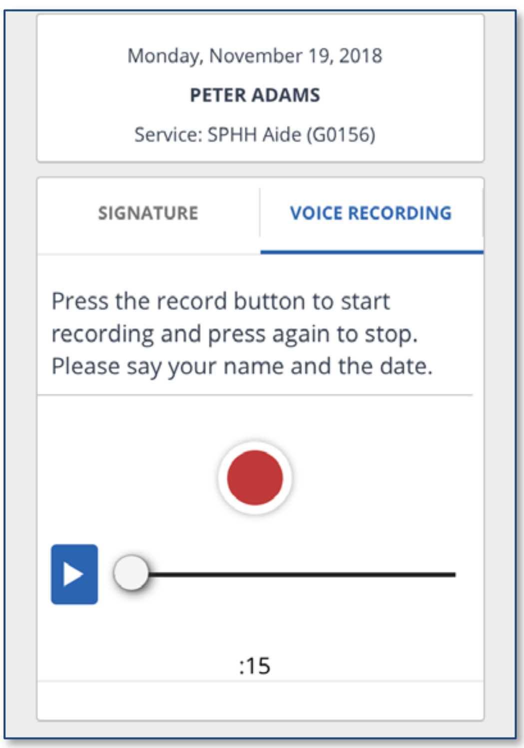
9. The *SIGNATURE/VOICE RECORDING* screen displays.

The preferred method of confirmation is to use voice recording.

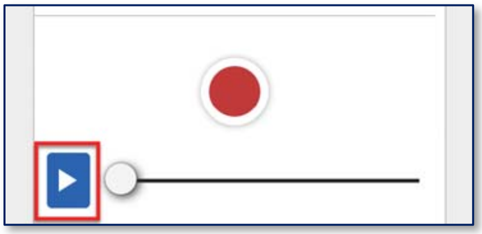
- **SIGNATURE**: Sign in the box.



- **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.

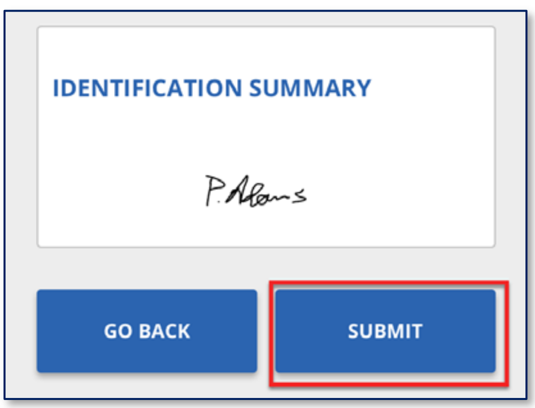


10. After signing or recording the voice, tap **CONTINUE**.

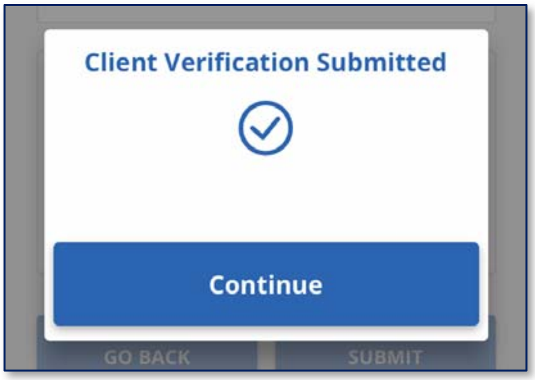
If both voice recording and signature exists, SMC prompts the user to choose which confirmation to associate to the visit.

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.

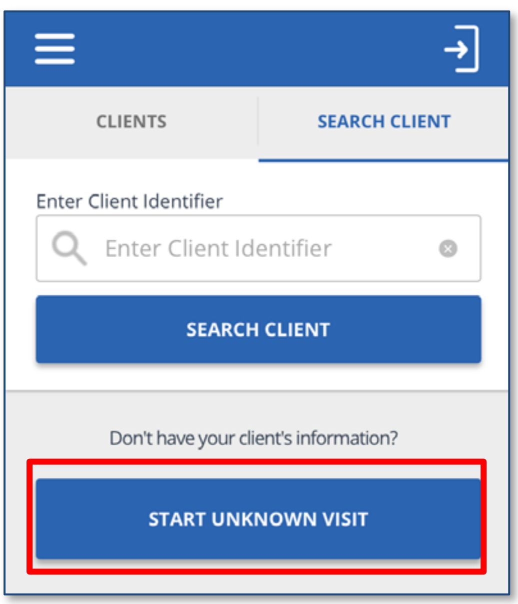


Starting an Unknown Visit

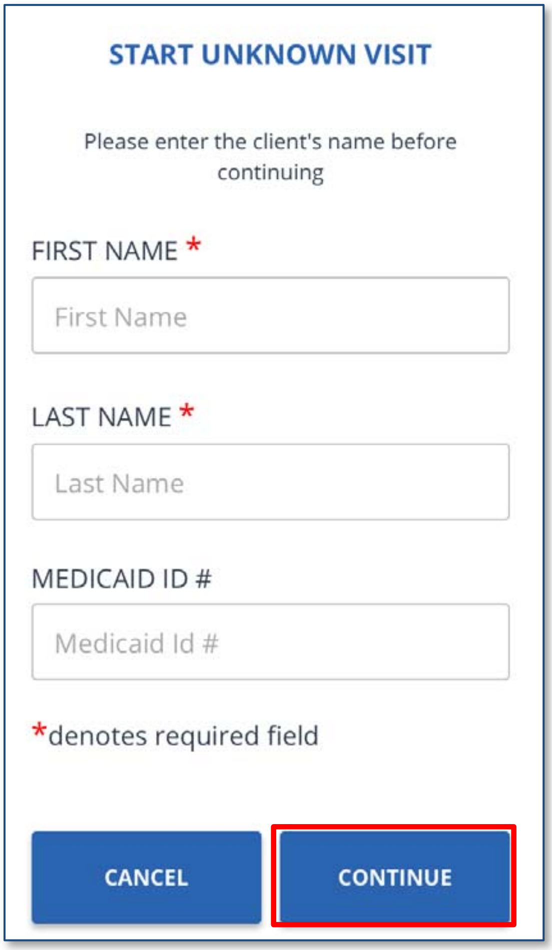
If the Medicaid ID or Client ID entered is not found when trying to start a visit, the employee can start an unknown visit. Unknown visits appear in Sandata EVV as an *Unknown Client Visit* exception and must be fixed in *Visit Maintenance*.

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

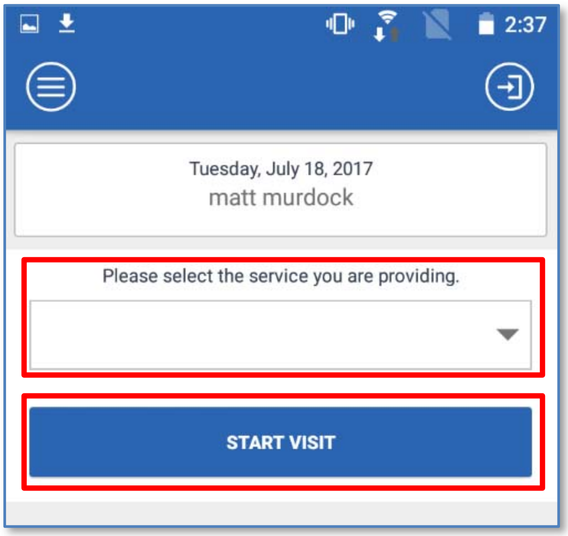
1. Locate the EVV Device or the employee's personal device.
2. Log in to SMC.
3. Tap **START UNKNOWN VISIT**.



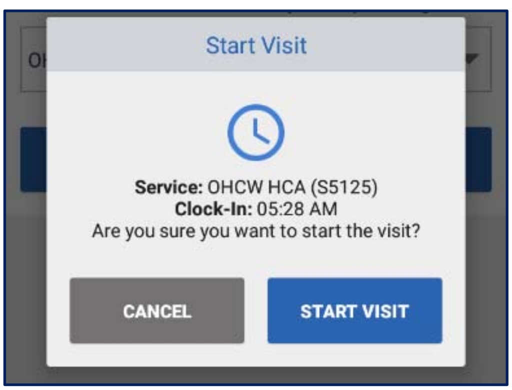
4. Enter the following information for the client (this information is available on the *Memo* screen of the *Visit Details* in the *Visit Maintenance* module).
    - **FIRST NAME** (Required)
    - **LAST NAME** (Required)
    - **Medicaid ID** # (Optional – if available)



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



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.

Telephonic Visit Verification

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.

English toll-free numbers. Please refer to your Call Reference Guide for additional languages.

Service ID	Description	Service ID	Description
101	SPHH Aide (G0156)	616	Passport - LPN (T1003)
105	Physical Therapies (G0151)	636	IO NSG - LPN (T1003)
115	Occupational Therapies (G0152)	656	My Care - LPN (T1003)
125	Speech Language Pathology Therapies (G0153)	707	OHCW HCA (S5125)
202	SPHH Nsg - RN (G0299)	717	Passport HCA (S5125)
303	SPHH Nsg - LPN (G0300)	727	Passport - Waiver Choices HCAS (T2025)
404	PDN (T1000)	747	Passport - Consumer Directed Personal Care (T1019)
415	OHCW - Choices HCAS (T2025)	757	My Care - HCA (S5125)
505	OHCW Nsg - RN (T1002)	777	Passport HCA Personal Care (S5125)
515	Passport - NSG - RN (T1002)	808	OHCW PCA (T1019)
520	My Care - Waiver Choices HCAS (T2025)	818	Passport - PCA (T1019)
535	IO NSG - RN (T1002)	838	HPC
555	My Care - RN (T1002)	842	Participant-Directed Homemaker-Personal Care (HPC)
565	My Care - Waiver Consumer-Directed PCA (T1019)	878	My Care - PCA (T1019)
606	OHCW Nsg - LPN (T1003)	909	RN Assessment (T1001)

English 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 – No
Call In / Out	Select Service
Change Service	Client Voice Recording
Client Verification: Visit	Client Verification: Service

Calling Instructions **STX«ACCOUNT»**

Calling In: When arriving at the client's home, make sure you have the following information:

- Your Santrax ID.
- Your Client's ID.

1. **Dial any of the toll-free numbers assigned to your agency.**
   If you are experiencing difficulties with the first toll- free number, please use the second toll-free number.
   Santrax will say: **"Welcome, please enter your Santrax ID."**
2. **Press the numbers of your Santrax ID on the touch tone phone.**
   Santrax will say: **"You entered (SANTRAX ID). Press (1) for Yes, (2) for No."**
3. **Press (1) to confirm your Santrax ID or press (2) to retry.**
   Santrax will say: **"Is this a group visit? Press (1) for Yes or (2) for No."**
4. **Press (2) for not a group visit.**
   Santrax will say: **"Please select (1) to call in or (2) to call out."**
6. **Press the (1) key to "Call In".**
   Santrax will say: **"Received at (TIME). Please enter first client ID or hang up if done."**
7. **Press the numbers of the client's ID.**
   Santrax will say: **"Received at (TIME). Please enter first client ID or hang up if done."**
8. **Hang up.**

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 ❶ thru ❹ 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: **"Would you like to continue the visit with the new service?"**

14. **Press the (1) for Yes or to (2) for No**
    Note:
    When switching to a different service for the same client please press (1) for Yes and repeat steps ⓬-⓭ to enter the next service before continuing. Press (2) for No when all services are complete.

    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."**

Calling Instructions **STX«ACCOUNT»**

15. **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."***

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

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.

- 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.

TIP

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: *"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: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
4	Press 2 for No.
	Santrax will say: *"Press 1 to call-in or 2 to call-out."*
5	Press the 1 to call-in.
	Santrax will say: *"Received at [Time]." After a brief pause, Santrax will say: "Please enter first client ID or hang up if done."* 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 or 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*: "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: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
4	Press 2 for No.
	Santrax will say*: "Please select 1 to call-in or 2 to call-out."*
5	Press the 2 to call-out.
	Santrax will say*: "Received at [Time]." After a brief pause, Santrax will say: "Please enter first client ID or hang up if done."*
6	Enter the Client ID number.
	Santrax will say: "Please enter the Service ID."
7	Press the three-digit ID of the care performed.
	Santrax will say: "You entered [Service description]. Please press 1 to accept, 2 to retry."
8	Press the 1 to accept.
	Santrax will say: *"Would you like to continue the visit with a new service? Press 1 for yes, press 2 for no".*
9	Press 2 for no.

For each prompt, Santrax allows a caller three attempts to enter the information correctly. After three unsuccesful 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.

10	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	Call In / Out
Select Service	Change Service
Client Voice Recording	Client Verification: Visit
Client Verification: Service	

Calling Instructions **STX«ACCOUNT»**

Calling In: When arriving at the client's home, make sure you have the following information:

- Your Santrax ID.
- Your Client's ID.

1. **Dial any of the toll-free numbers assigned to your agency.**
If you are experiencing difficulties with the first toll- free number, please use the second toll-free number.
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)."**
Call prompts are heard in the selected languages.
2. **Press the number that corresponds to the language you wish to hear.**
All prompts for the remainder of the call will be heard in that language.
Santrax will say: **"Welcome, please enter your Santrax ID."**
3. **Press the numbers of your Santrax ID on the touch tone phone.**
Santrax will say: **"You entered (SANTRAX ID). Press (1) for Yes, (2) for No."**
4. **Press (1) to confirm your Santrax ID or press (2) to retry.**
Santrax will say: **"Is this a group visit? Press (1) for Yes or (2) for No."**
5. **Press (2) for not a group visit.**
Santrax will say: **"Please select (1) to call in or (2) to call out."**
6. **Press the (1) key to "Call In".**
Santrax will say: **"Received at (TIME). Please enter first client ID or hang up if done."**
7. **Press the numbers of the client's ID.**
Santrax will say: **"Received at (TIME). Please enter first client ID or hang up if done."**
8. **Hang up.**

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 ❶ thru ❺ 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: **"Would you like to continue the visit with the new service?"**

14. **Press the (1) for Yes or to (2) for No**
    Note:
    When switching to a different service for the same client please press (1) for Yes and repeat steps ⓬-⓭ to enter the next service before continuing. Press (2) for No when all services are complete.

    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."**

15. **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."**

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

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 ❶ thru ❺ 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: **"Would you like to continue the visit with the new service?"**

14. **Press the (1) for Yes or to (2) for No**
    Note:
    When switching to a different service for the same client please press (1) for Yes and repeat steps ⓬-⓭ to enter the next service before continuing. Press (2) for No when all services are complete.

    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."**

15. **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."**

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

Individual Visit Call Process - Multi-language Line

Call-In	
1	Dial the toll-free number.
	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)." **Each prompt will be heard in its respective language.*
2	Press the number that corresponds to the desired language.
	Santrax will say*: "Welcome, please enter your Santrax ID."*
3	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."*
4	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
5	Press 2 for No.
	Santrax will say: "Please select 1 to call-in or 2 to call-out."
6	Press 1 to call-in.
	Santrax will say*: "Received at [Time]." After a brief pause, Santrax will say:* "*Please enter first client ID or hang up if done.*" 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.
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.
	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)." **Each prompt will be heard in its respective language.*
2	Press the number that corresponds to the desired language.
	Santrax will say*: "Welcome, please enter your Santrax ID."*
3	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."*
4	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
5	Press 2 for No.
	Santrax will say: "Press 1 to call-in or 2 to call-out."
6	Press 2 to call-out.
	Santrax will say*: "Received at [Time]." After a brief pause, Santrax will say:* "*Please enter first client ID or hang up if done.*"
	Enter the Client ID number.
7	*Santrax will say: "Please enter the Service ID."*
	Press the three-digit ID of the care performed.
8	*Santrax will say: "You entered [Service description]. Please press 1 to accept, 2 to retry."*
	Press the 1 to accept.
	Santrax will say: *"Would you like to continue the visit with a new service? Press 1 for yes, press 2 for no".*
9	Press 2 for no.

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.

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.

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 providing like services to a single client at the same time

- If multiple providers deliver care to a single client at the same time with like services:
  - 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.

Switching Services During a Visit

You may be authorized to provide more than one service during a visit. This can be recorded using Sandata Mobile Connect (SMC) and/or Telephonic Visit Verification (TVV). The services will appear as separate visits in Visit Maintenance, with unique call-in and call-out times.

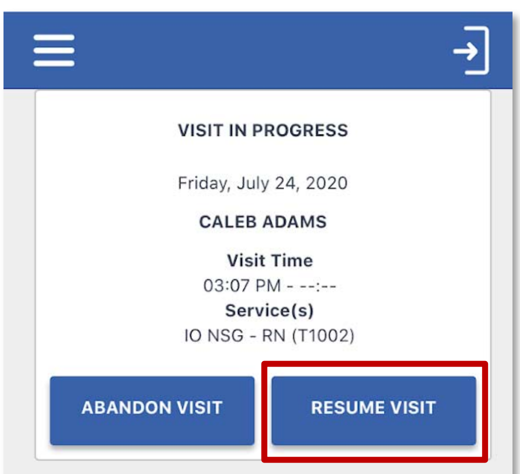
When providing multiple services, you will record a clock-in, record each time you switch services, and record a clock-out. For example, for a visit with two (2) services, you will be making a total of three (3) calls.

Switching Services with Sandata Mobile Connect (SMC)

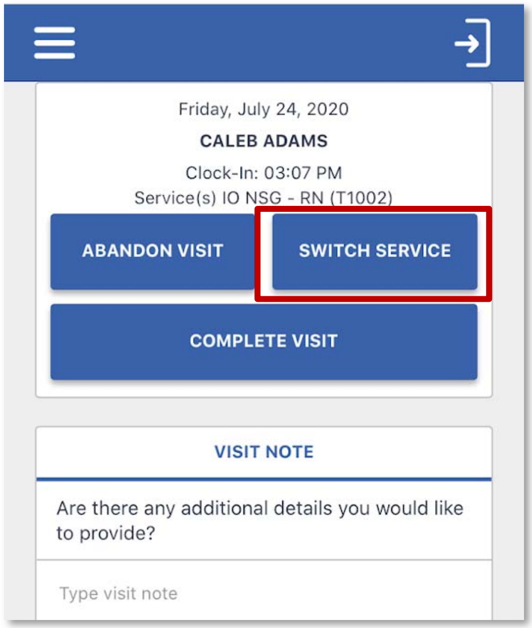
The call-in process does not change. Log into SMC, search for the client, select the initial service, then click **Start Visit**.

When you are ready to switch services:

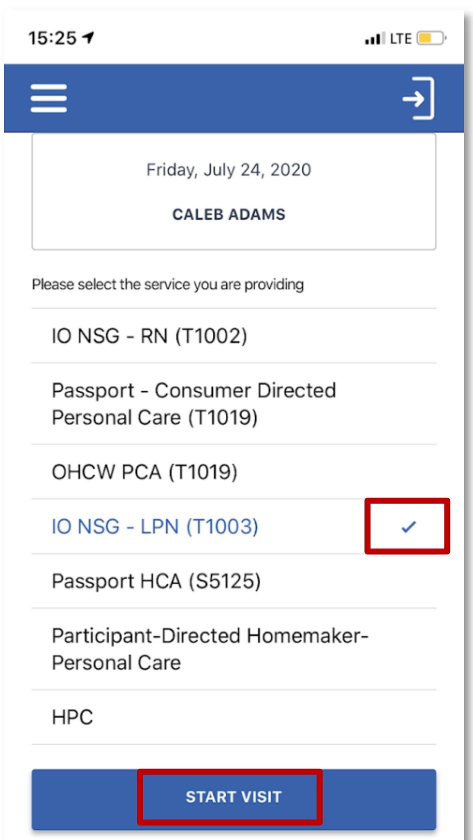
1. Log in to SMC. The Home screen shows the visit is in progress. Tap **RESUME VISIT**.



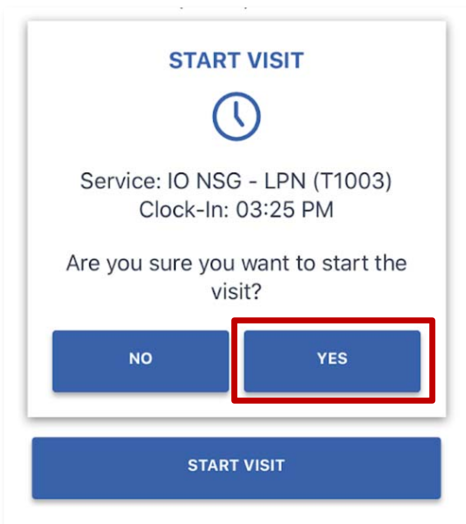
2. Enter Visit Notes if applicable, then tap **SWITCH SERVICE**.



3. Select the *Service* from the drop-down list, then click **START VISIT**.



4. A pop-up appears with the start time. This will also be the end time of the previous service. Tap **YES**. The new service is now being recorded. The visit call-out process is the same as a single service visit.



Switching Services with Telephonic Visit Verification (TVV)

The initial TVV call-in process is the same, even if you plan to switch services. Dial the toll-free number associated with your agency, and call-in for the visit. When you are ready to switch services, dial the toll-free number associated with your agency, and answer the prompts. Note: you will still need to call-out at the end of the final service.

The prompts related to switching services are listed in **bold**.

Multi-Service Switch	
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: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
4	Press 2 for No.
	Santrax will say*: "Please select 1 to call-in or 2 to call-out."*
5	Press the 2 to call-out.
	Santrax will say*: "Received at [Time]."* After a brief pause, Santrax will say: "*Please enter first client ID or hang up if done.*"
6	Enter the Client ID number.
	Santrax will say: *"Please enter the Service ID."*
7	Press the three-digit ID of the care performed.
	Santrax will say: *"You entered [Service description]. Please press 1 to accept, 2 to retry."*
8	Press the 1 to accept.
	Santrax will say: *"Would you like to continue the visit with a new service? Press 1 for yes, press 2 for no".*
9	**Press the 1 to continue the visit with a new service.**
	Santrax will say: *"Please enter the service ID."*
10	**Press the three-digit ID of the care performed. NOTE: This is ID for the NEW service being provided.**
	Santrax will say: *"You entered [Service description]. Please press 1 to accept, 2 to retry."*
11	**Press 1 to accept. NOTE: From the point on, you will be calling out for the previous service.**

12	*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."* *5.* 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: "Please enter second Client ID or hang up if done.* h) Hang up. 2) Press (2) if the client is unable to participate. a) *Santrax will say: "Please enter second Client ID or hang up if done.* b) Hang up.

Multi-Service Call Out	
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: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
4	Press 2 for No.
	Santrax will say*: "Please select 1 to call-in or 2 to call-out."*
5	Press the 2 to call-out.
	Santrax will say*: "Received at [Time]."* After a brief pause, Santrax will say: "*Please enter first client ID or hang up if done.*"
6	Enter the Client ID number.
	Santrax will say: *"Please enter the Service ID."*
7	Press the three-digit ID of the care performed.
	Santrax will say: *"You entered [Service description]. Please press 1 to accept, 2 to retry."*
8	Press the 1 to accept.
	Santrax will say: *"Would you like to continue the visit with a new service? Press 1 for yes, press 2 for no".*
9	**Press 2 for no. You are calling out for the second service.**
10	*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."* *6.* Press (1) to record client's voice (hand phone to client): c) *Santrax will say: "Please say your first and last name and today's date."* d) The client will say their name and the date. e) *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."* f) Client will press appropriate choice. g) *Santrax will say: "The service performed was [service description]. Press 1 to confirm, 2 to deny, 3 to replay."* h) Client will press appropriate choice. i) *Santrax will hang up.* 3) Press (2) if the client is unable to participate. a) *Santrax will say: "Please enter second Client ID, or hang up if done.* b) Hang up.

This Page Intentionally Left Blank.

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.

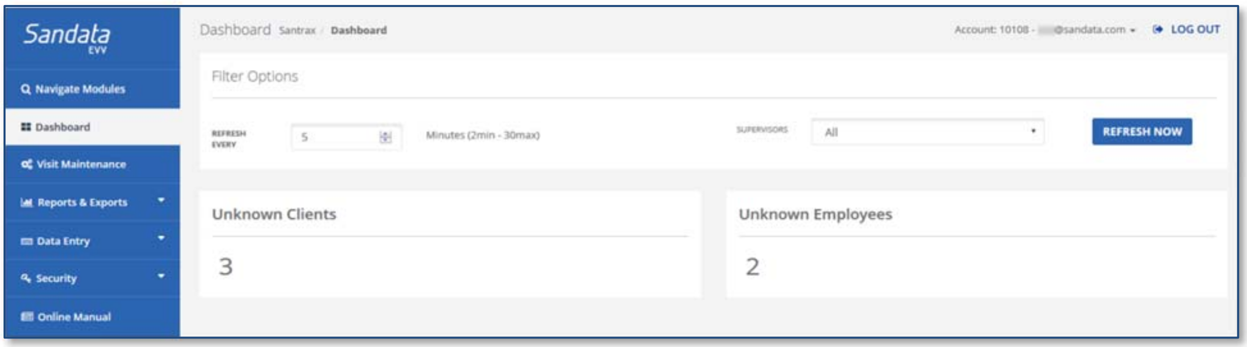
A visit includes an employee, a client, a service, GPS location (for SMC) or the telephone number (for TVV), the client verification information, as well as call-in and call-out times (date and time) from a client's location.

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.

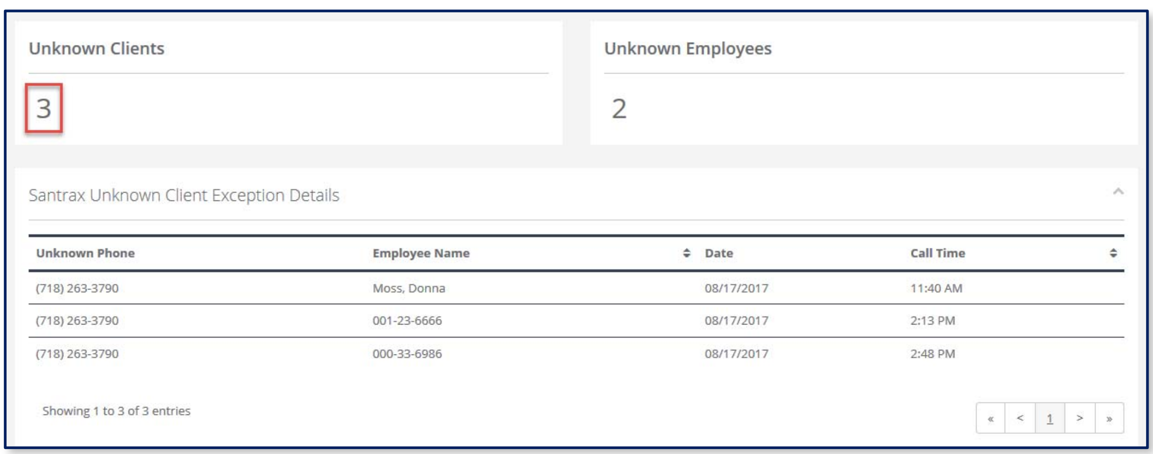
Sandata EVV is not used for billing and does not guarantee payment for a visit.

Sandata EVV Dashboard

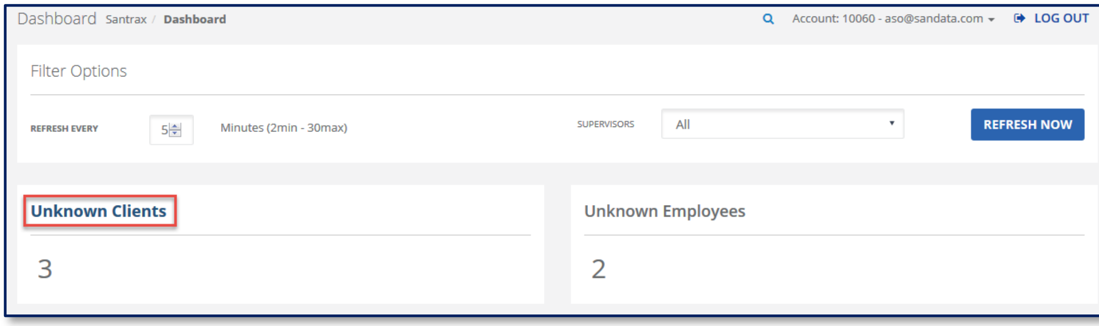
The Sandata EVV *Dashboard* monitors current day's visits to identify two specific exceptions. These exceptions fall into two categories—**Unknown Clients** and **Unknown Employees**. The data defaults to refresh every five minutes but can be changed to refresh between 2 – 30 minutes. All exception types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

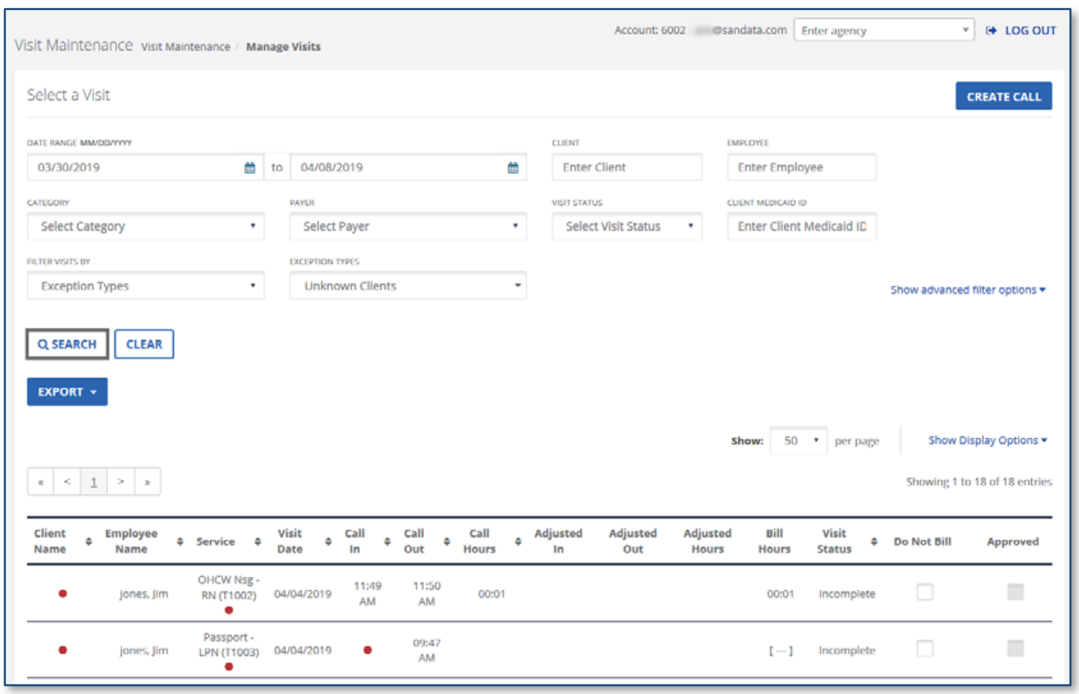


1. Click the exception category total to display a listing of the visit exception details for that specific exception.

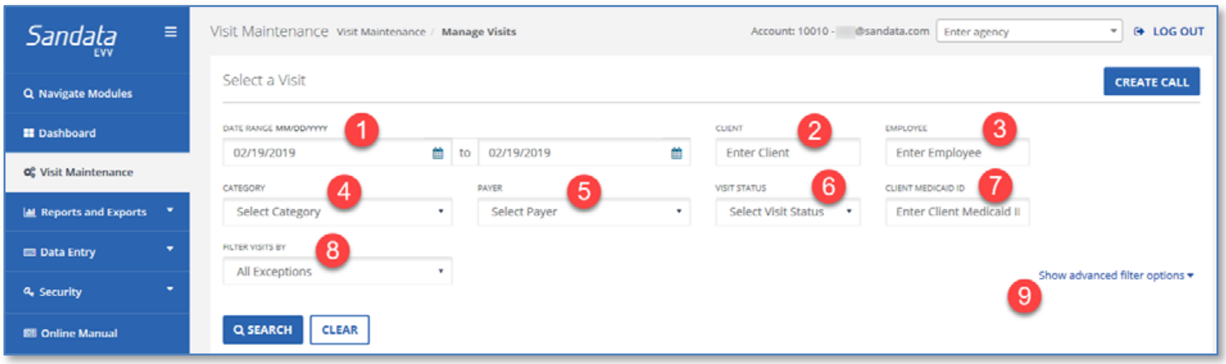


2. Click the exception category name to link to the *Visit Maintenance* module to view and edit the visits for that exception.





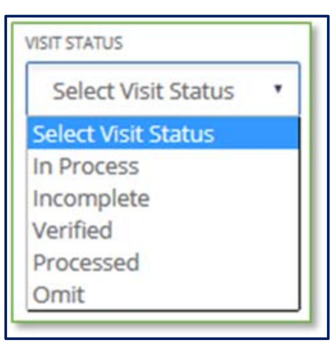
Visit Maintenance – Main Screen



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:

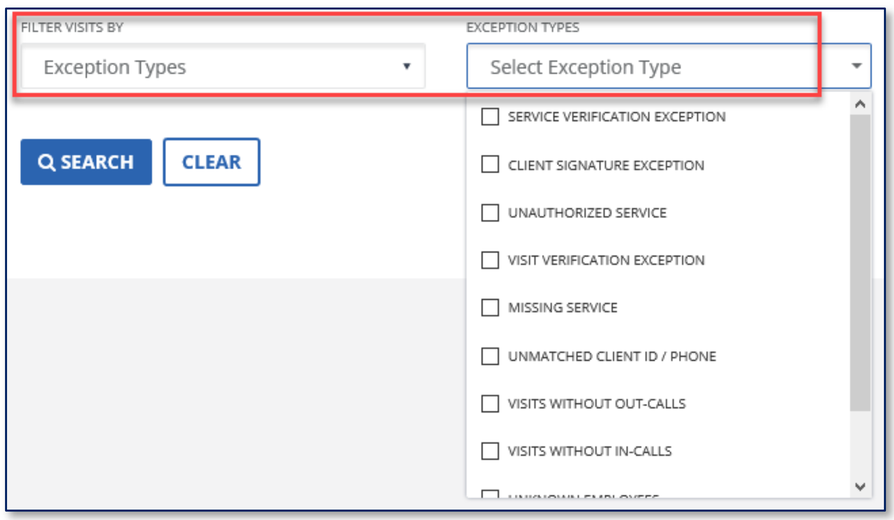


Status	Description
In Process	A visit has started and not yet completed
Incomplete	A visit has exceeded a 24-hr period and is still missing a call-in/call-out
Verified	A visit that does not contain any exceptions
Processed	A visit that does not contain any exceptions and has been returned to the claims 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.

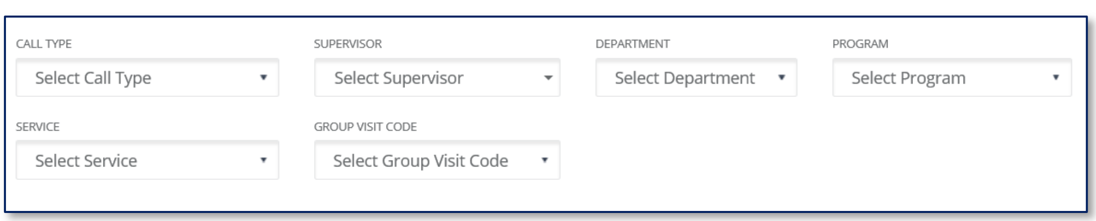


Exception	Description
CLIENT SIGNATURE EXCEPTION	Client's digital signature or voice recording is missing.
MISSING SERVICE	Identifies when the service provided for the visit is not specified during the SMC call-in or Telephony call-out.
SERVICE VERIFICATION EXCEPTION	Client did not confirm the selected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

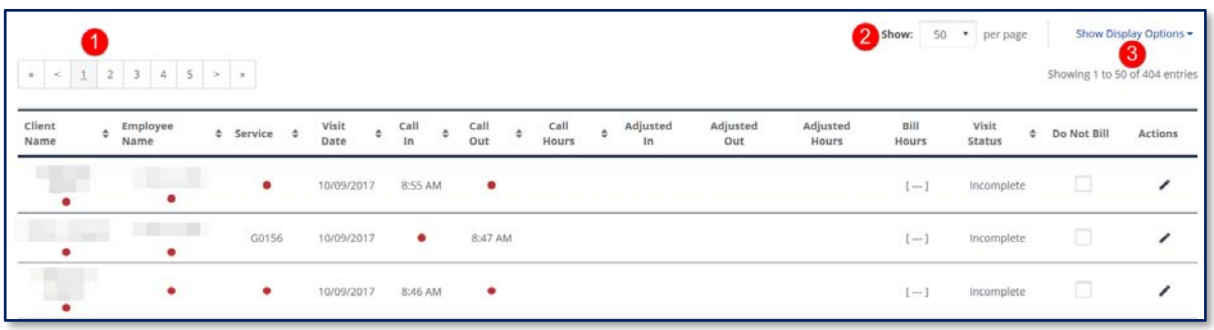


- **CALL TYPE**: Filter visits to show only **MVV** (mobile) or **Manual** calls.

- **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.

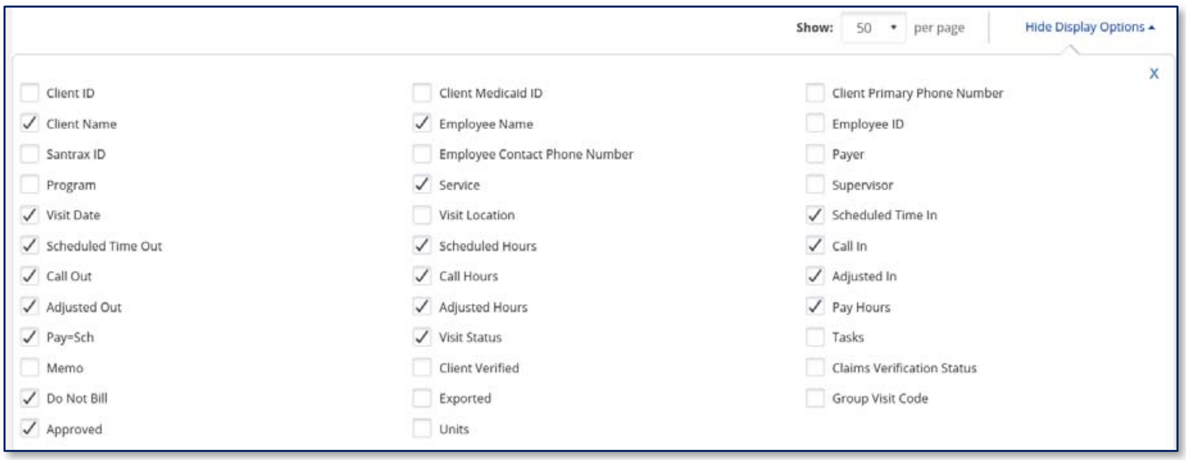
Search Results – Understanding the Visit Grid

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.



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**

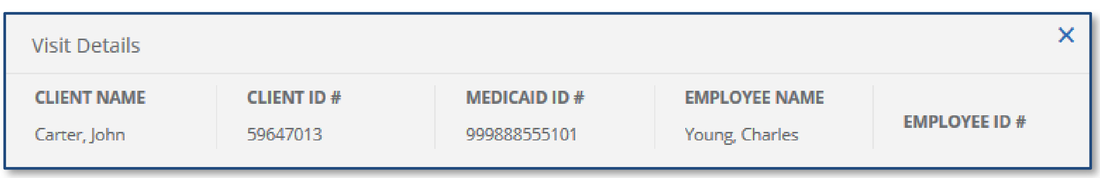
Hovering the mouse over an exception indicator displays a tool tip for that exception detail.

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.

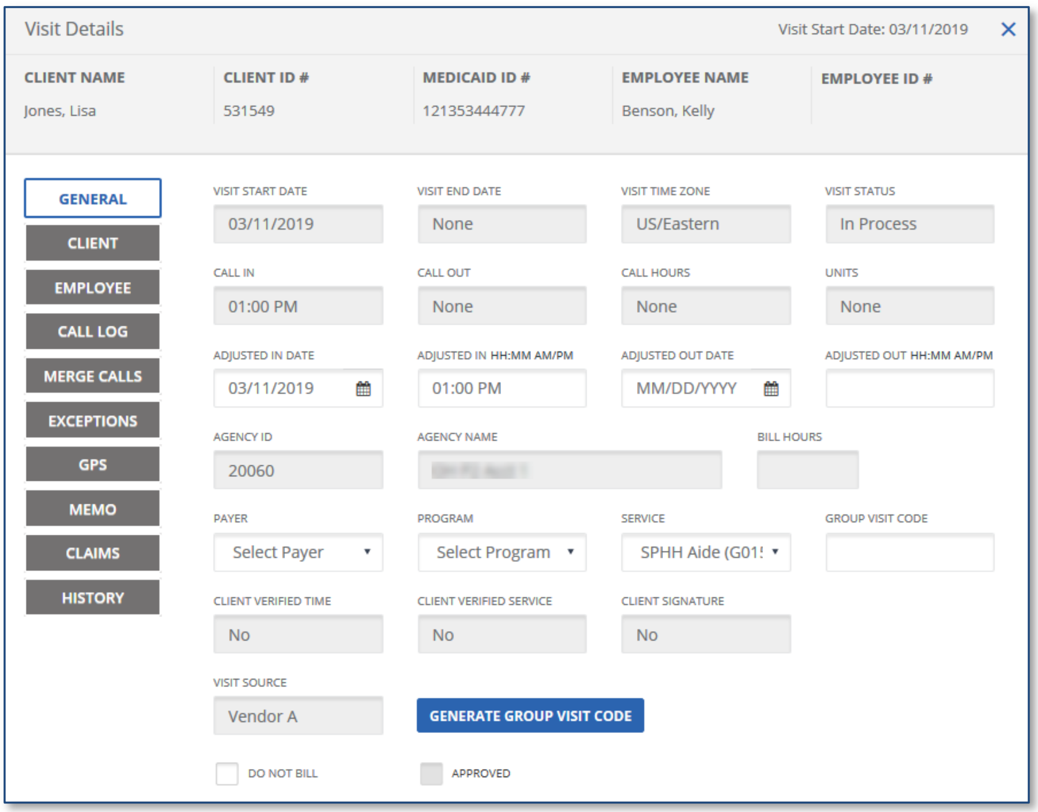
The top of *Visit Details* screen contains the **CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME** and **EMPLOYEE ID** information. There are also tabs on the left which display various details of the visit.



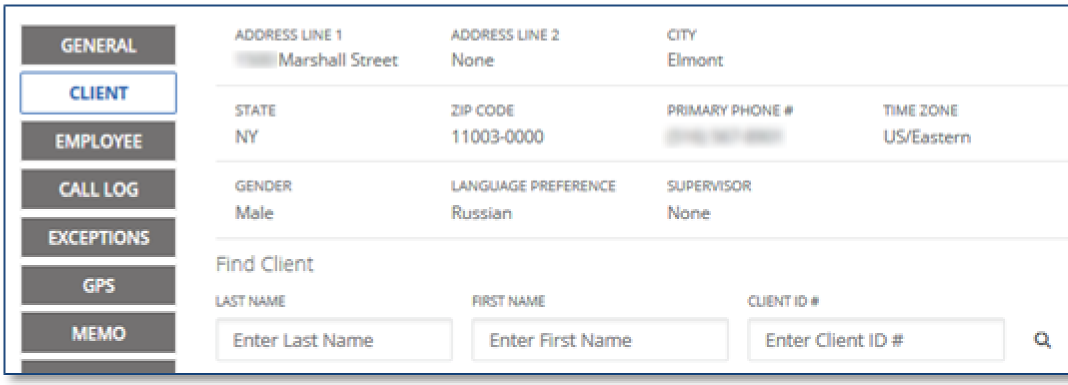
- *GENERAL:* contains the **CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME, EMPLOYEE ID, SCHEDULE IN, SCHEDULE OUT, SCHEDULE HOURS, VISIT START DATE, VISIT END DATE, VISIT TIME ZONE, VISIT STATUS, CALL IN, CALL OUT, CALL HOURS, UNITS, ADJUSTED IN DATE, ADJUSTED IN, ADJUSTED OUT DATE, ADJUSTED OUT, 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).

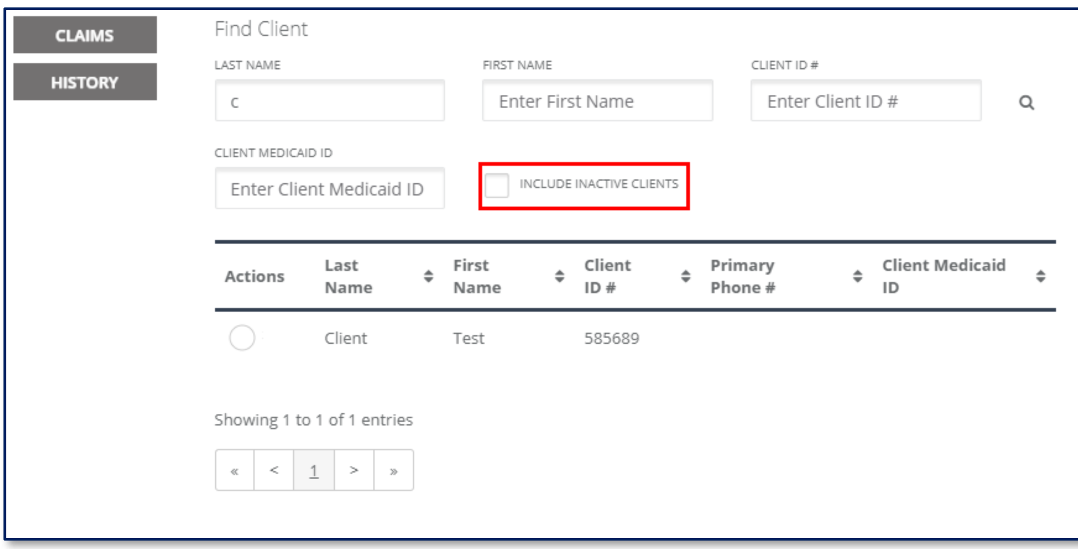
If the Service for a visit is associated with multiple payers, the **PAYER** and **PROGRAM** fields are editable to select values from the drop-down lists.



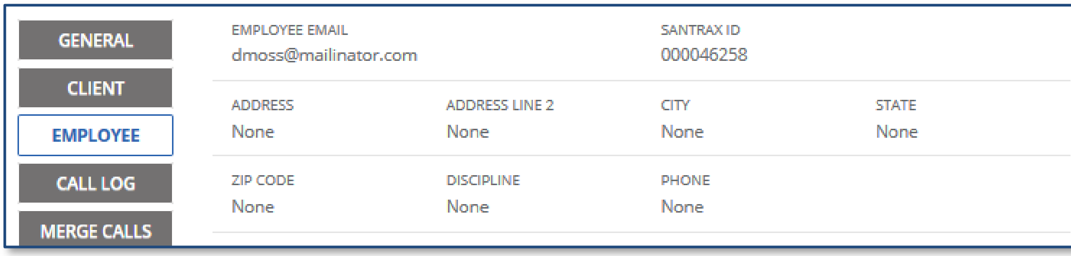
- *CLIENT:* This screen displays the client's details such as **ADDRESS, PHONE NUMBER** and **LANGUAGE PREFERENCE**.



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.



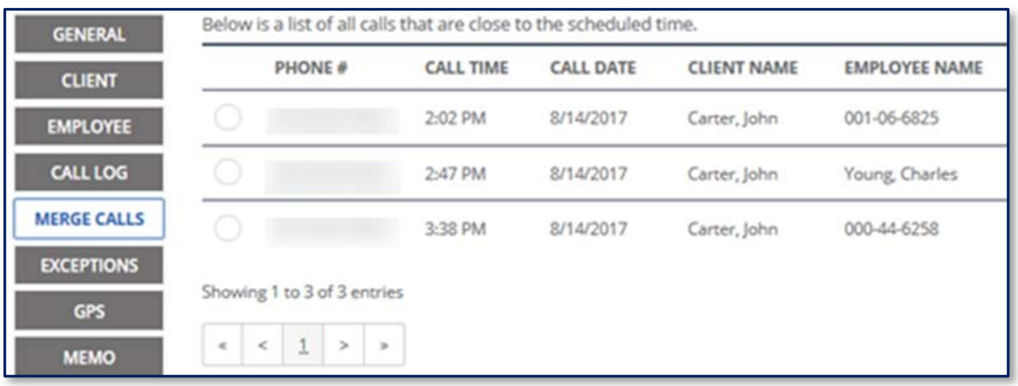
- *EMPLOYEE:* This screen displays the employee details such as: **EMPLOYEE EMAIL, SANTRAX ID, ADDRESS and PHONE.**



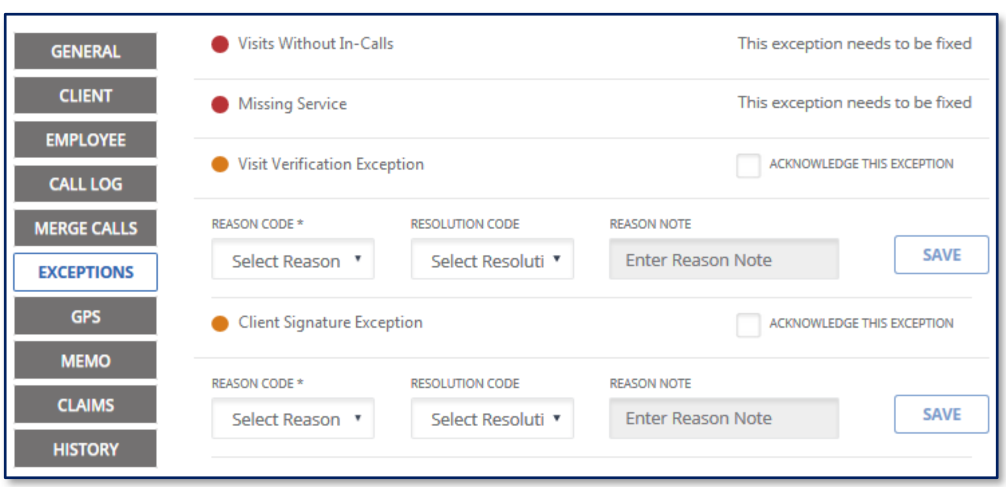
The screen also includes an option to change the employee for the visit, in instances when an incorrect Santrax ID was entered for the visit. An option is available to include inactive employees in the search.

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

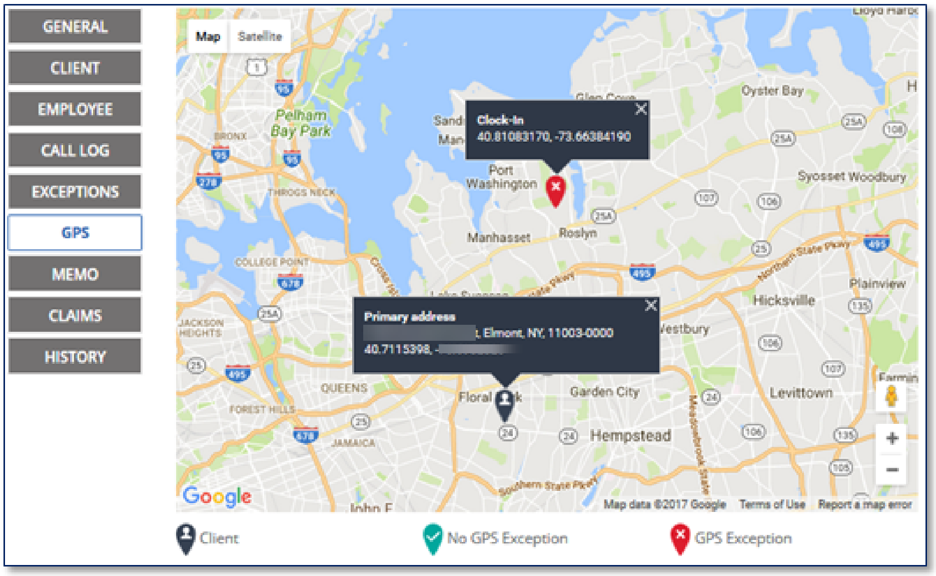
- *MERGE CALLS:* This screen appears if a visit is missing a call time. It shows a list of available calls that may be merged to the visit. Calls can be merged if there are within time proximity and not associated with any other visit.



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

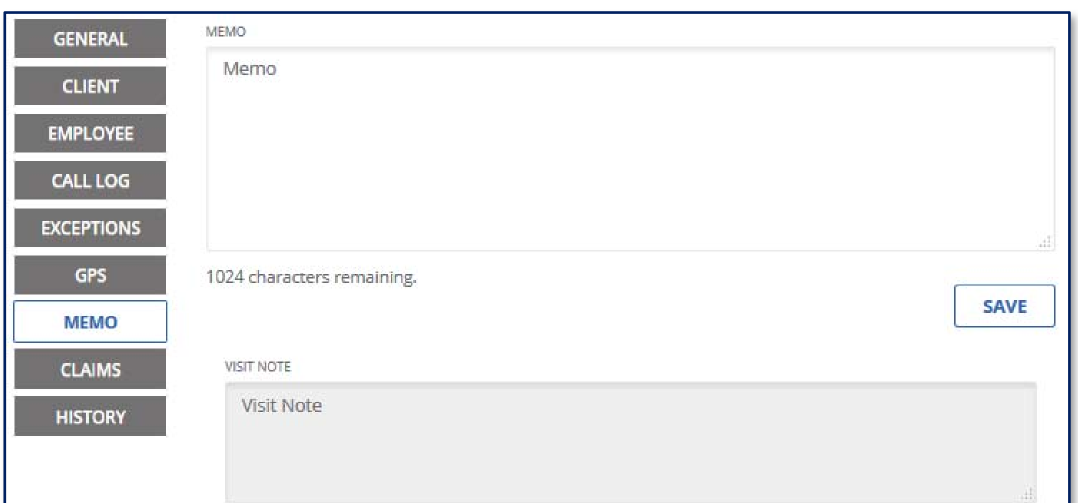


- *GPS:* This screen shows the location of the SMC call-in/call-out times relative to the client's home.

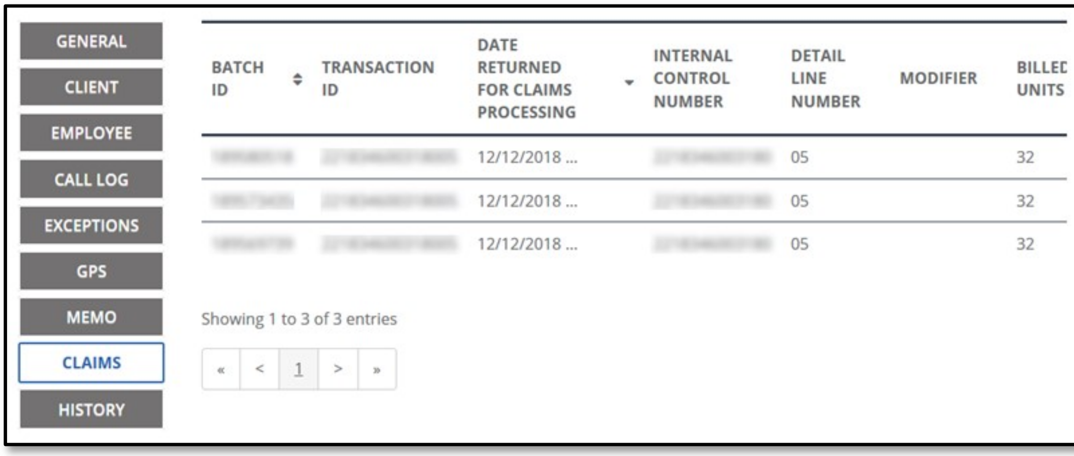


- *MEMO:* This screen allows the user to make a note and display notes previously entered related to the visit. It also includes a *Visit Note* screen which displays notes entered into SMC during call-out.

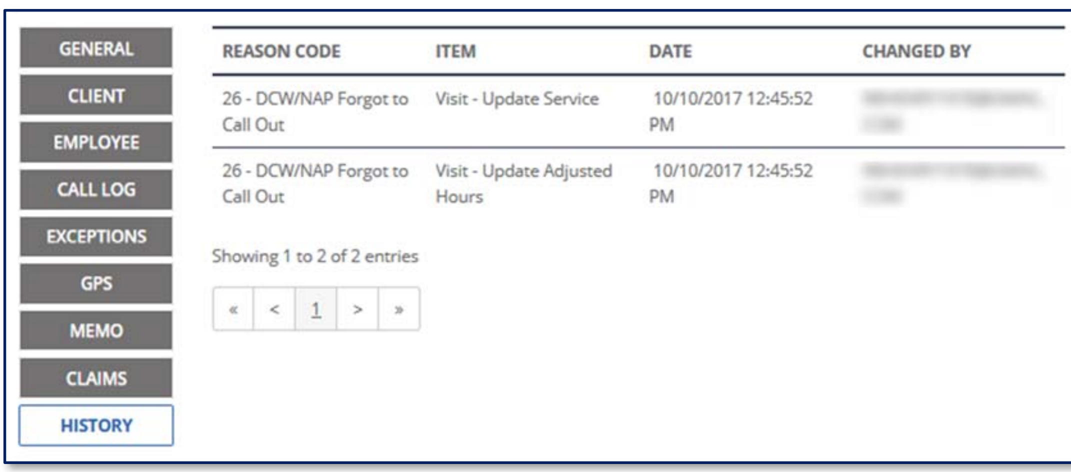
This information should not be used to fulfill ODM documentation requirement.



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



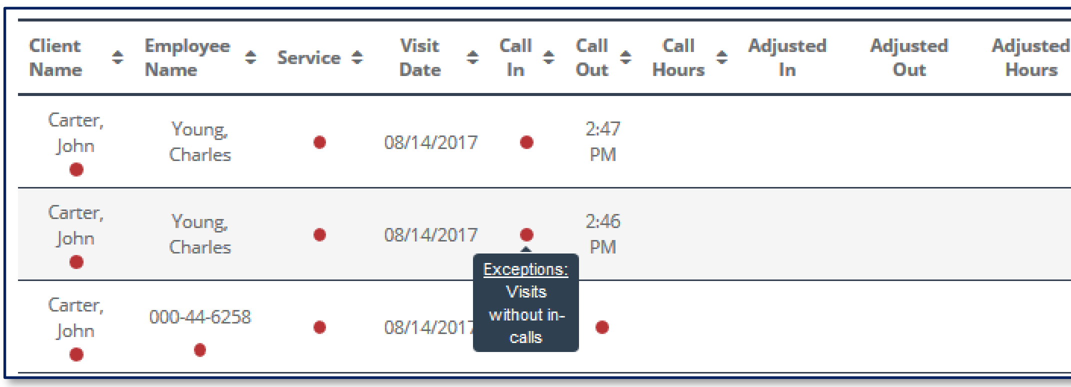
- *HISTORY*: This screen contains the audit history for the visit. Any change made to the visit is tracked and listed on this screen with the most recent change at the top.



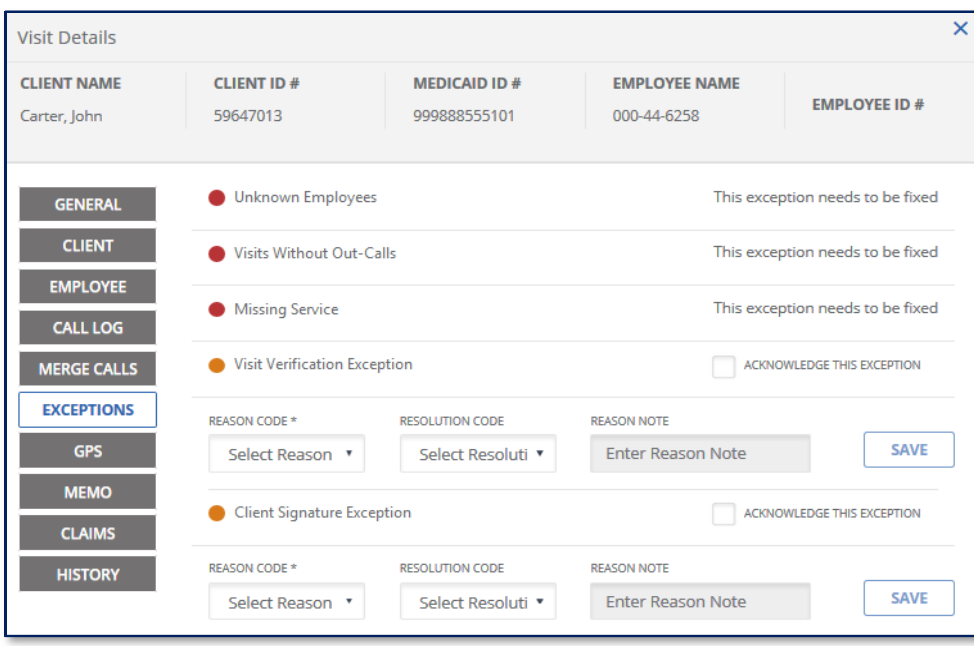
Identifying Exceptions

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).



- 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.



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.

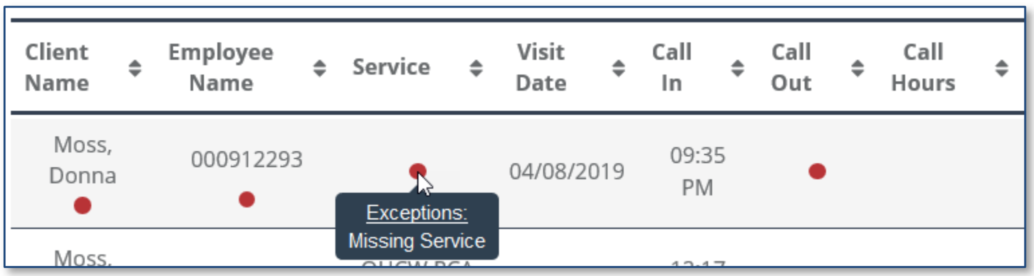
The available reason codes are:

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

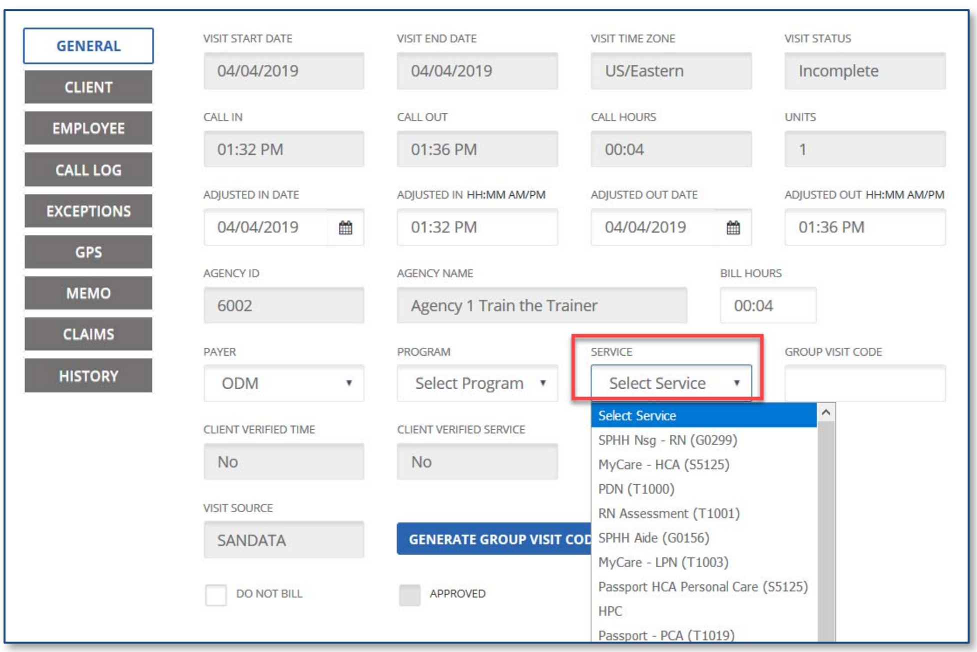
Missing Service Exception

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.



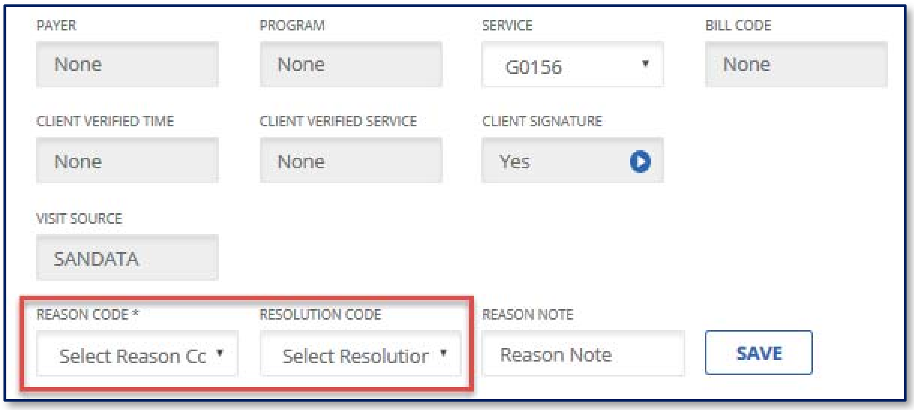
2. Select the correct service from the **SERVICE** field drop-down list.



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.

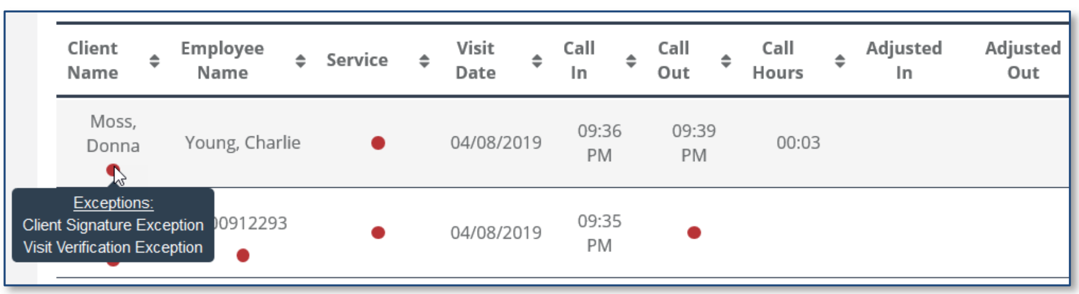


5. Click **SAVE**.

<u>Client Signature Exception</u>

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.

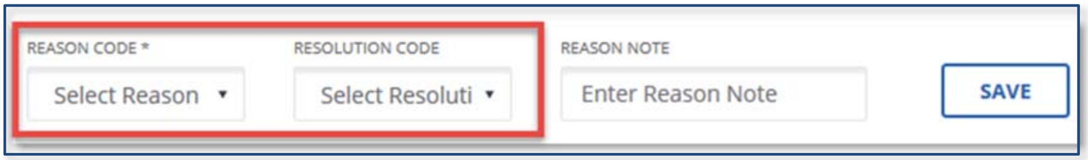


2. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Client Signature Exception line.

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.

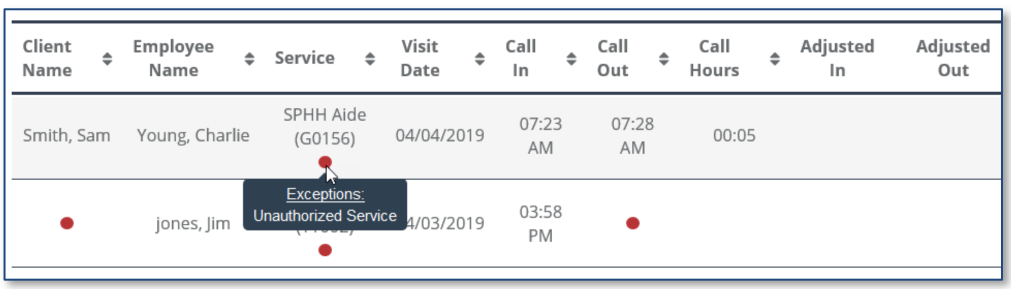


5. Click **SAVE**.

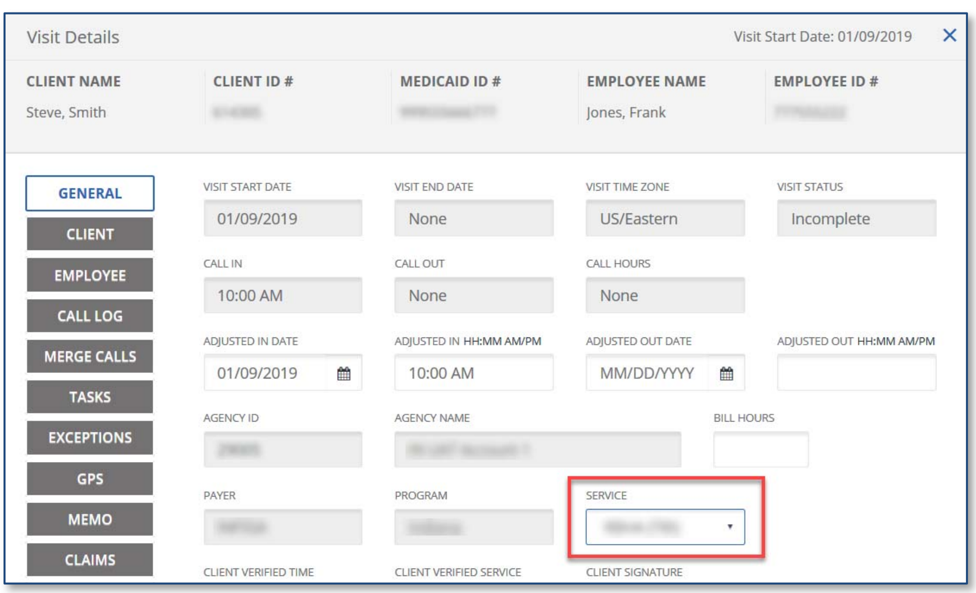
<u>Unauthorized Service Exception</u>

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.



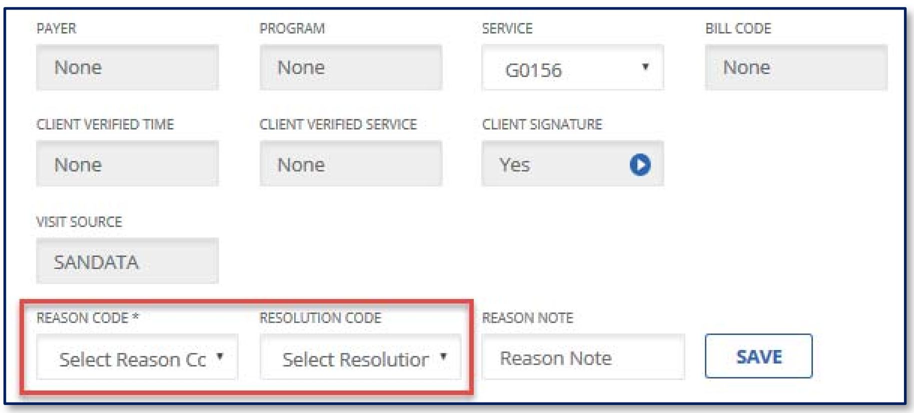
2. Select the appropriate service from the drop-down list. Note that the authorized services for the client must be received in order to fix this exception.



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.

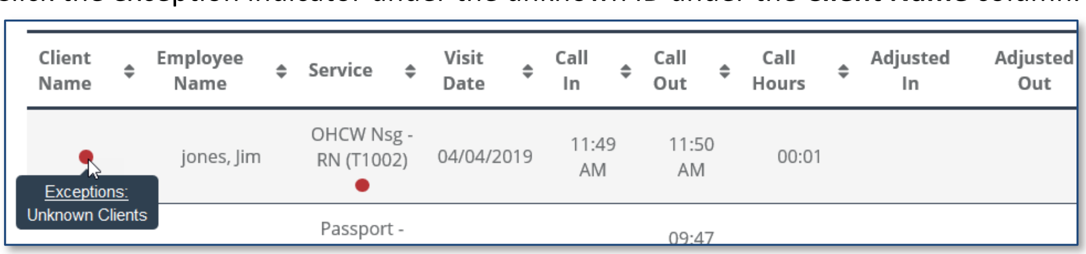


5. Click **SAVE**.

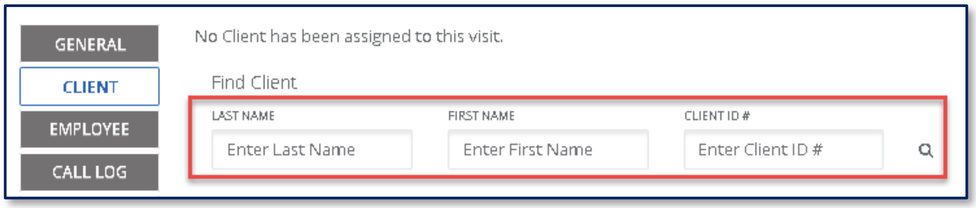
<u>Unknown Client Exception</u>

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.

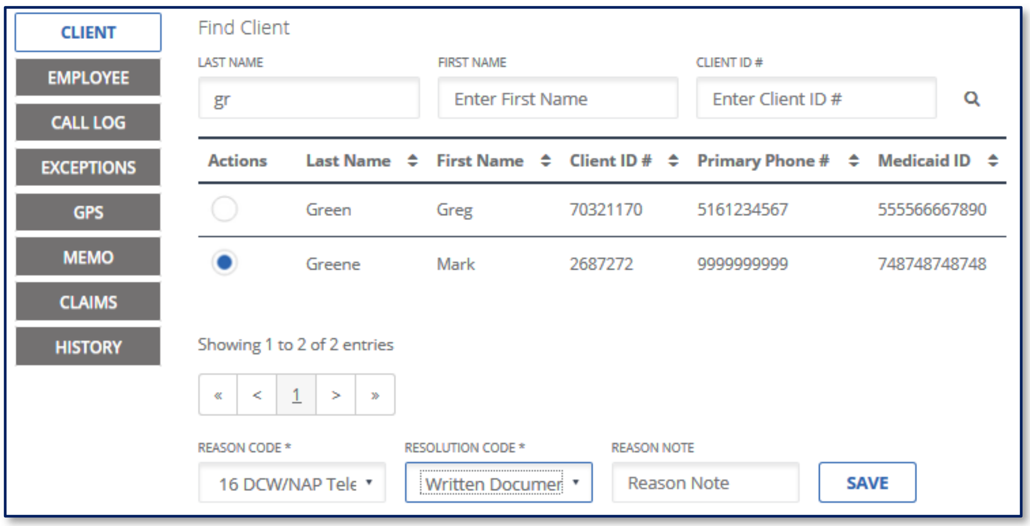
1. Click the exception indicator under the unknown ID under the **Client Name** column.



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



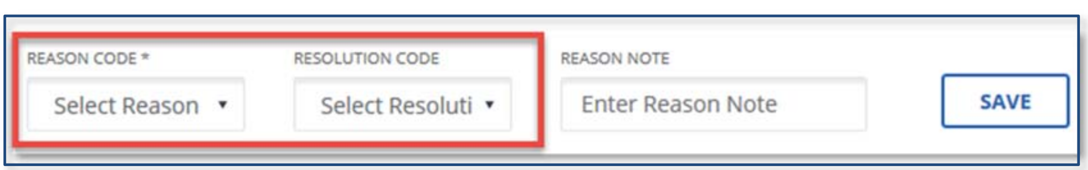
3. Select the client from the search results.



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.

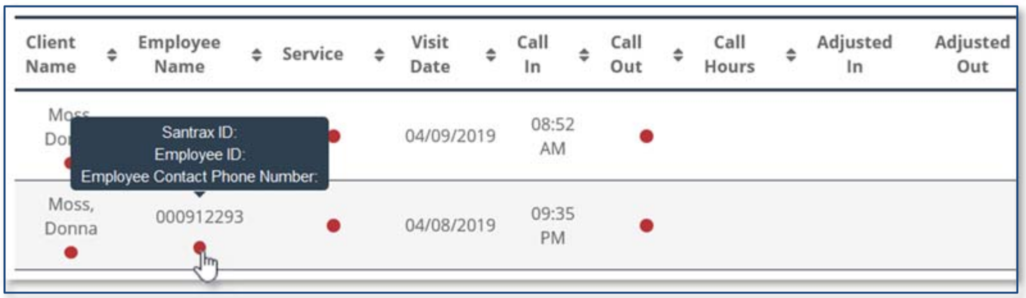


6. Click **SAVE**.

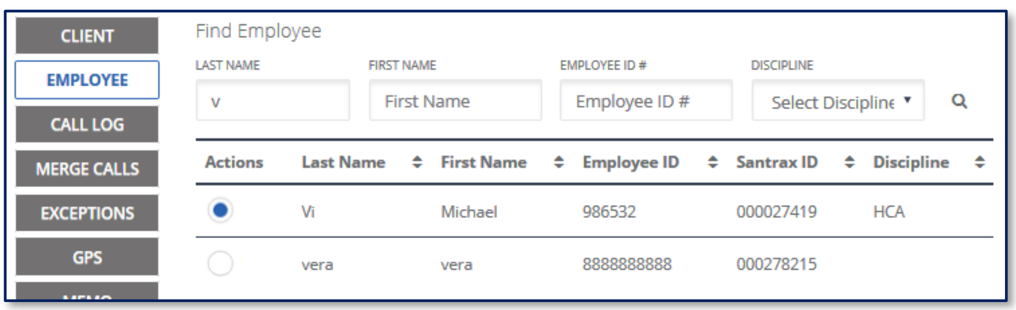
Unknown Employee Exception

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.



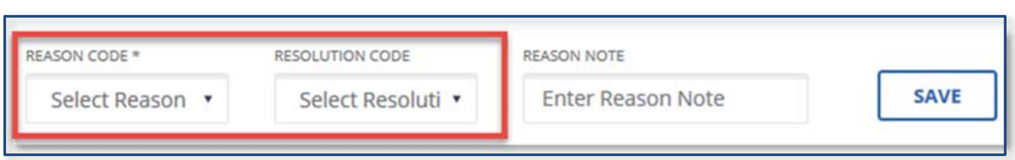
2. Use the search fields to search for the employee.
3. Select an employee from the search results.



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.



6. Click **SAVE**.

Unmatched Client Phone/ID

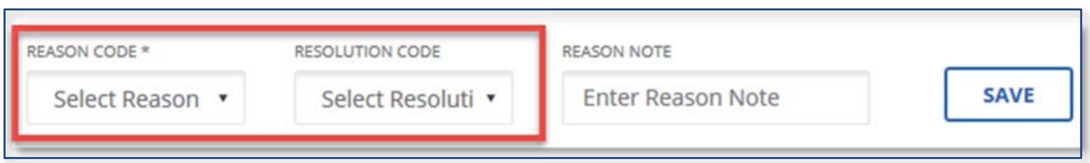
Identifies when a client ID is entered during a Telephony call, but the phone number the call was made from is not a number listed for the client. This exception type must be acknowledged for the visit to be in a verified state and eligible to be matched to a submitted claim.

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

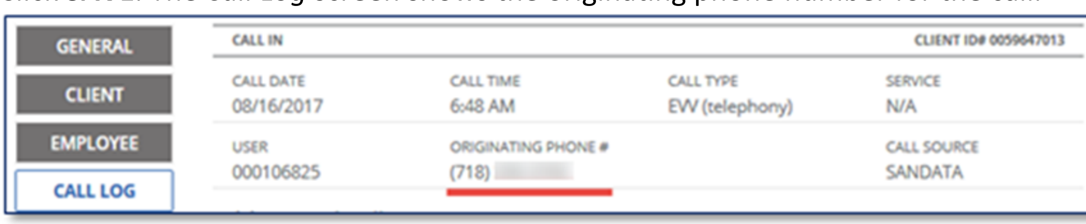
2. Select a **REASON CODE** from the list.

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

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



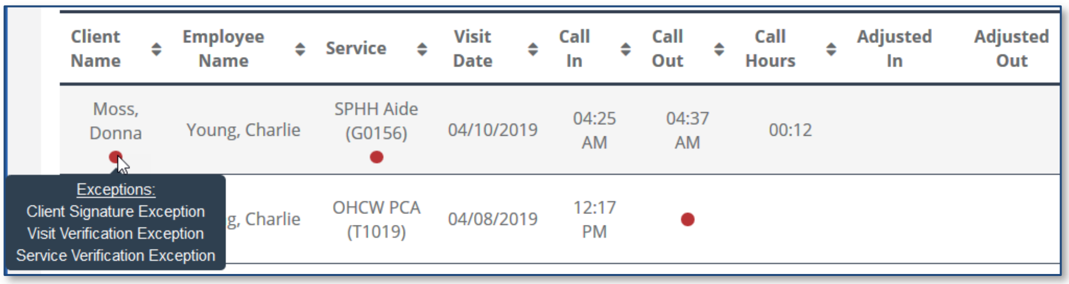
4. Click **SAVE**. The *Call Log* screen shows the originating phone number for the call.



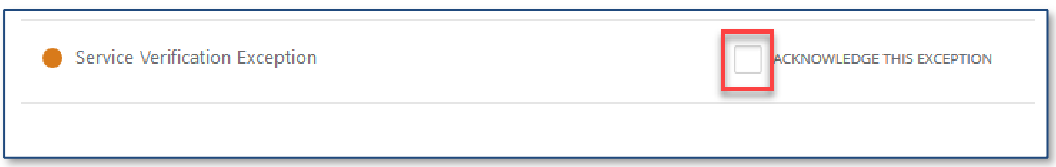
Service Verification Exception

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.



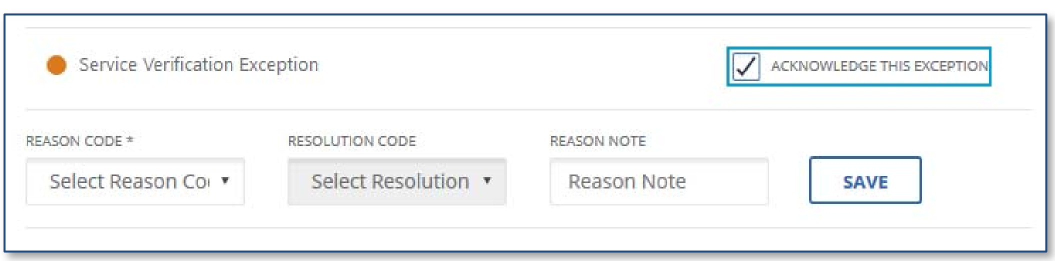
2. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Visit Verification Exception line.



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.

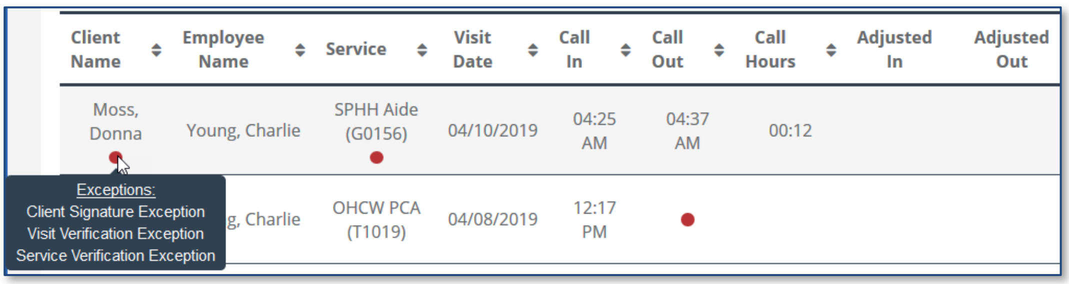


5. Click **SAVE**.

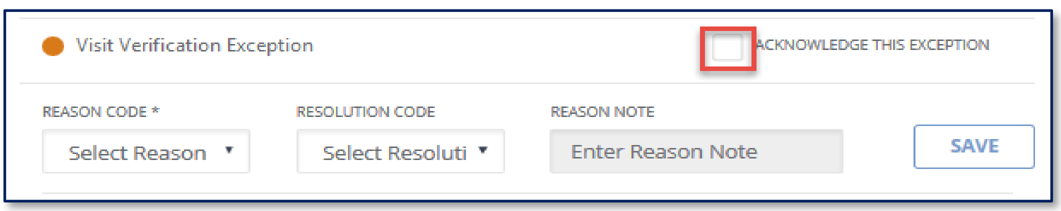
Visit Verification Exception

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.

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



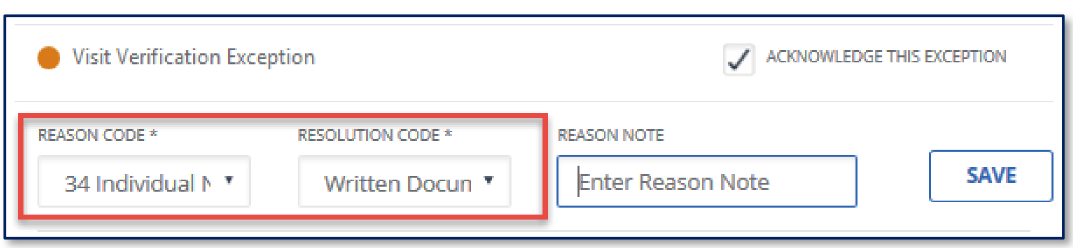
2. Check the **ACKNOWLEDGE THIS EXCEPTION** checkbox on the Visit Verification Exception line.



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

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

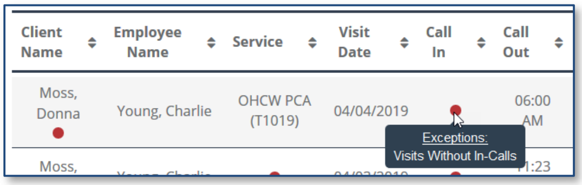
4. Select a **RESOLUTION CODE** from the list.

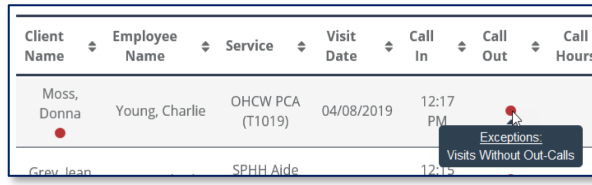


5. Click **SAVE**.

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.



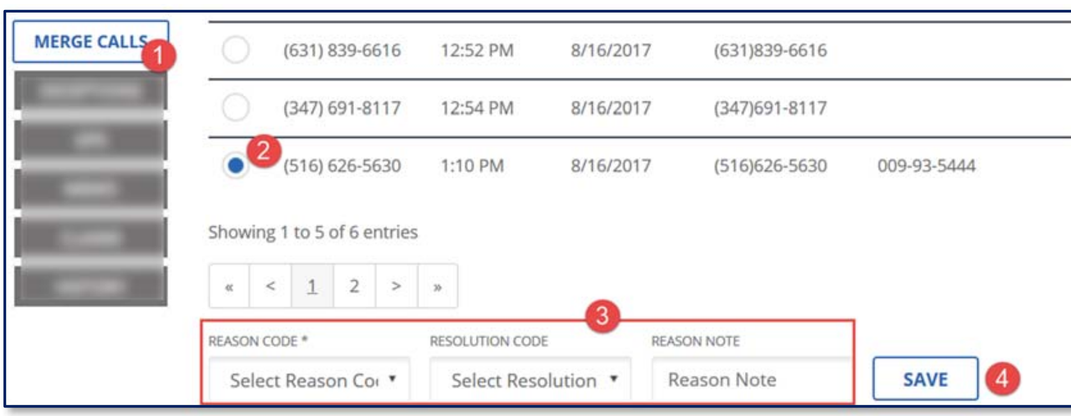


When a user clicks the exception indicator under the call time column, the *Visit Details* screen automatically opens to the *Call Log* screen.

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.



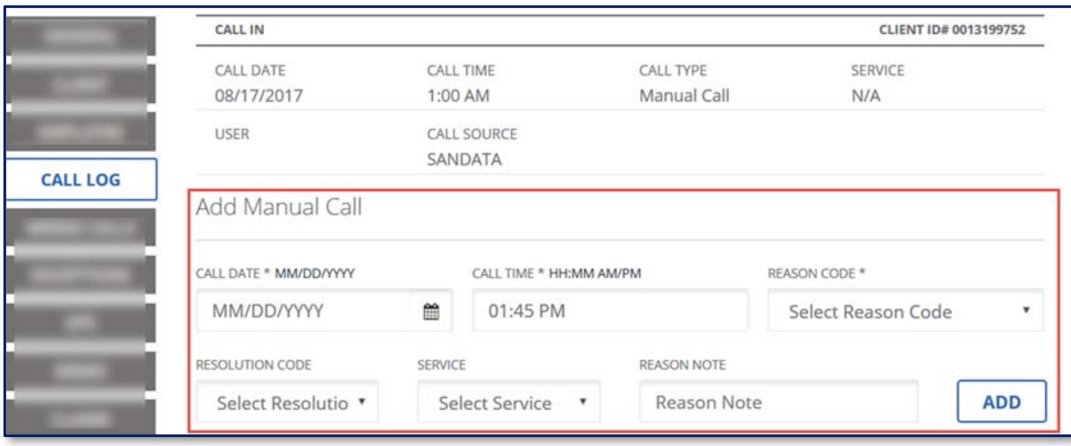
From the *Visit Details* screen:

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.



From the *Visit Details* screen:

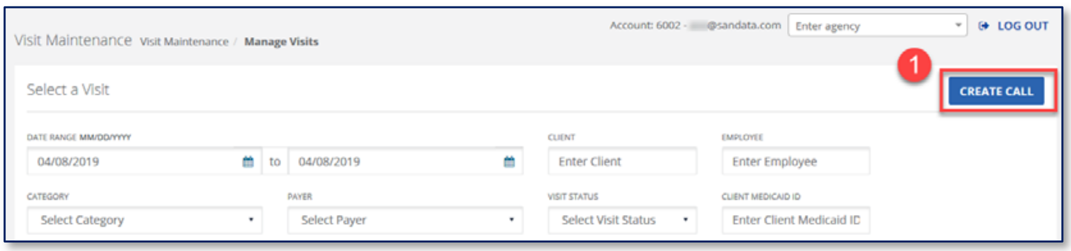
1. Click **CALL LOG**.
2. Enter the appropriate information into the fields.
3. Select the **REASON CODE, RESOLUTION CODE, SERVICE** and **REASON NOTE**, if needed.
4. Click **ADD**.

Create Call

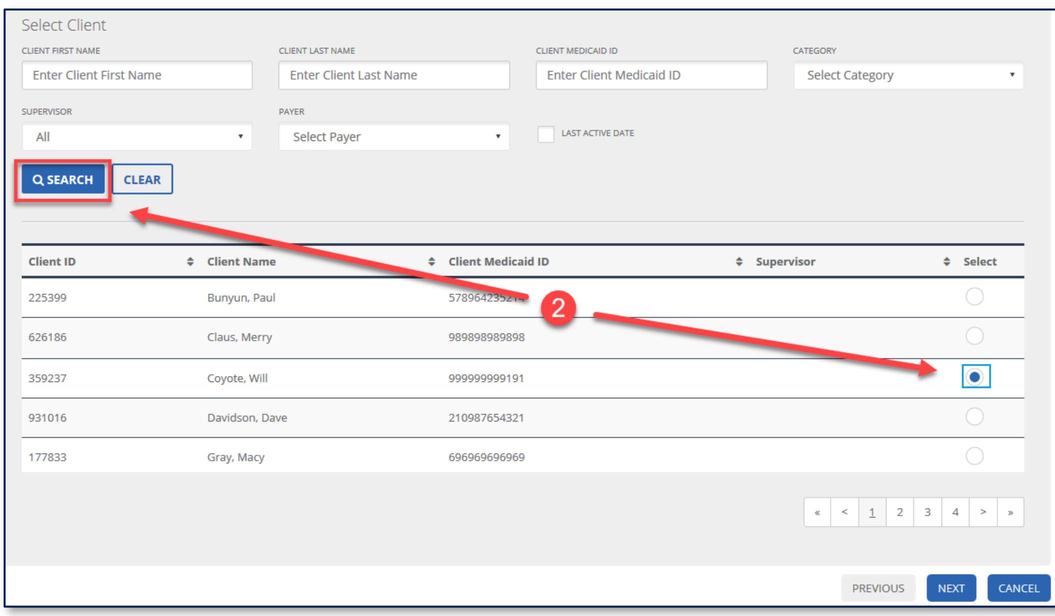
The Create Call feature allows the office user to create a call-in to document a visit in Sandata EVV, in instances when a visit took place but the employee did not call-in or call-out.

From the Visit Maintenance > Manage Visits screen

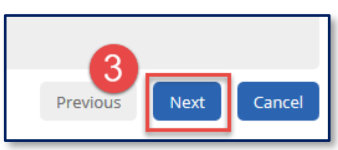
1. Click **CREATE CALL**.



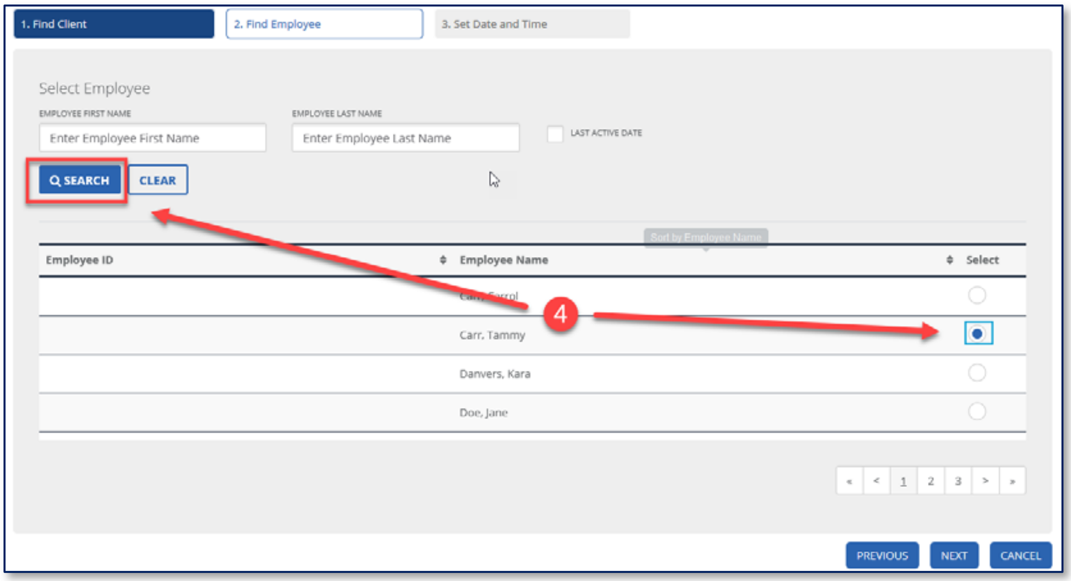
2. Search for and select a client.



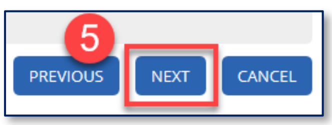
3. Click **Next.**



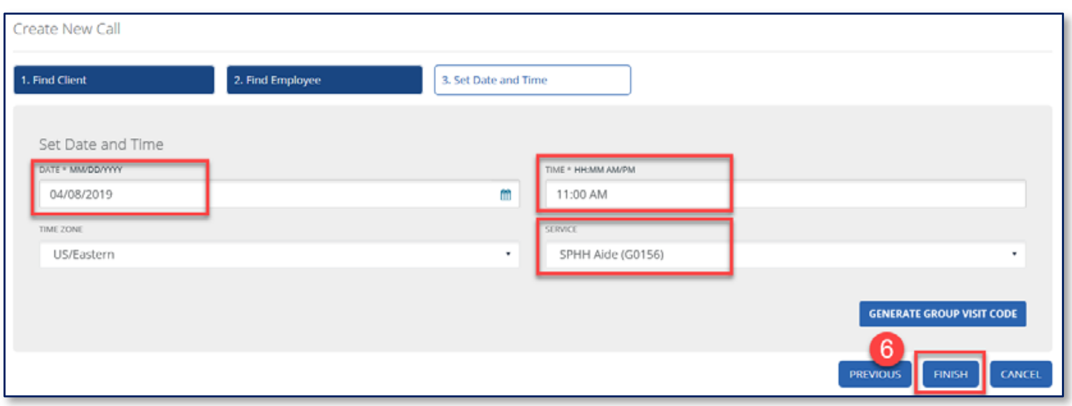
4. Search for and select an employee.



5. Click **Next**.

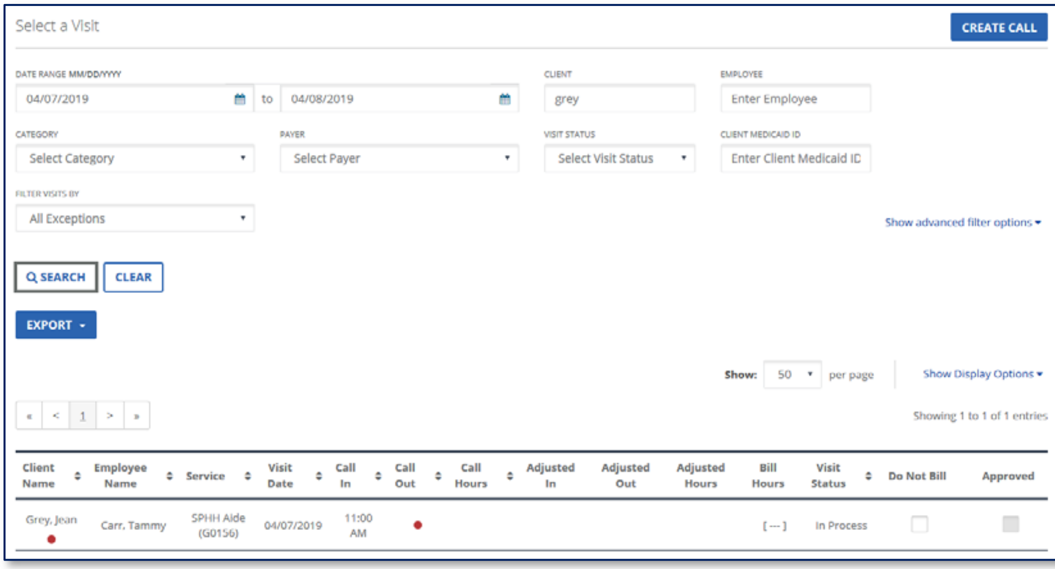


6. Select the date, time and service (based on Payer from client record) for the visit and click **FINISH**.

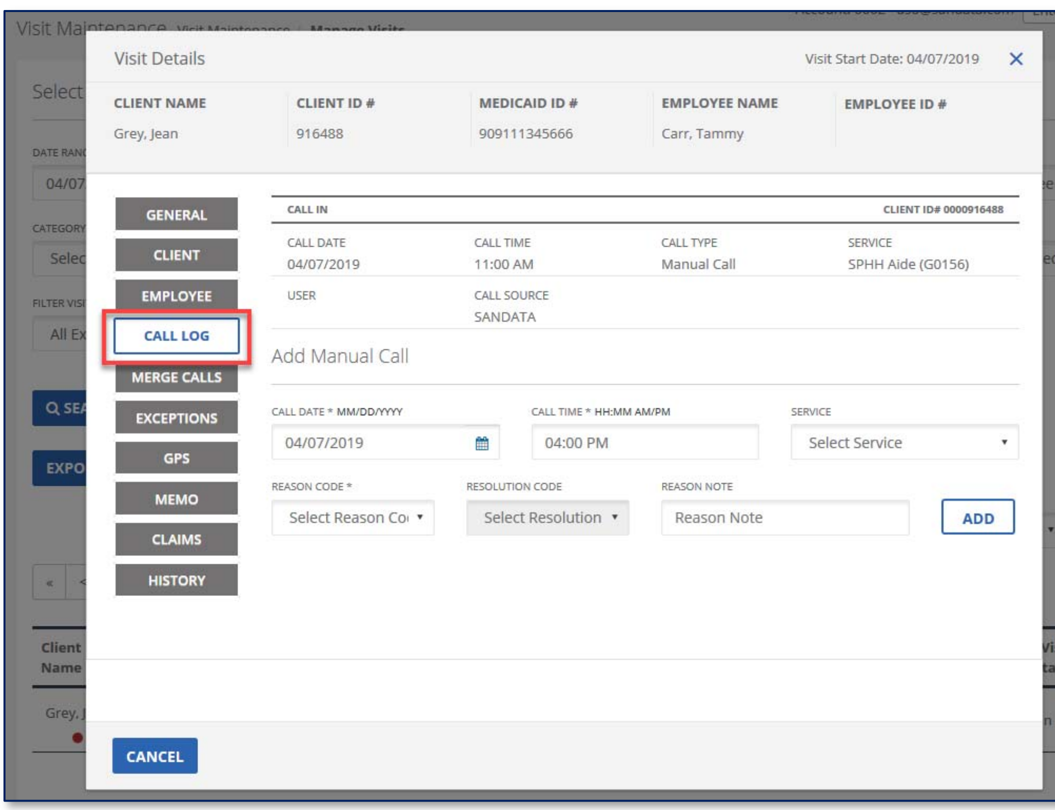


7. Click **OK** to save changes.

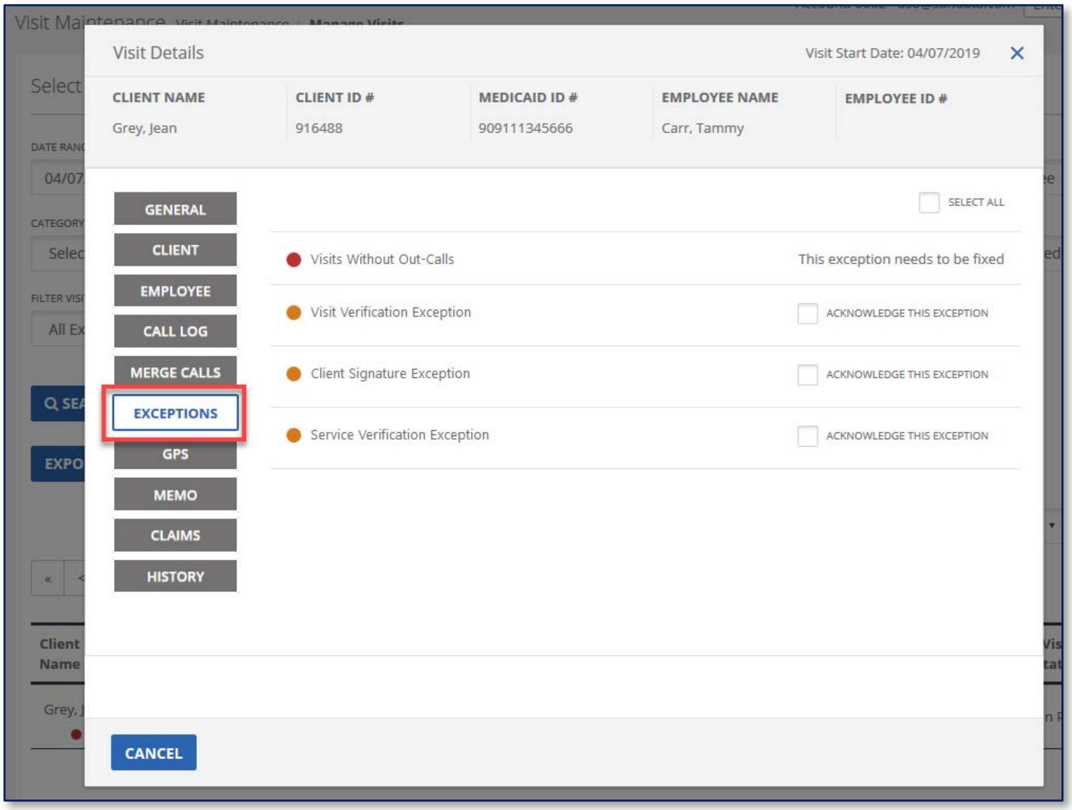
8. Search for your newly created call using the Visit Maintenance filters.



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

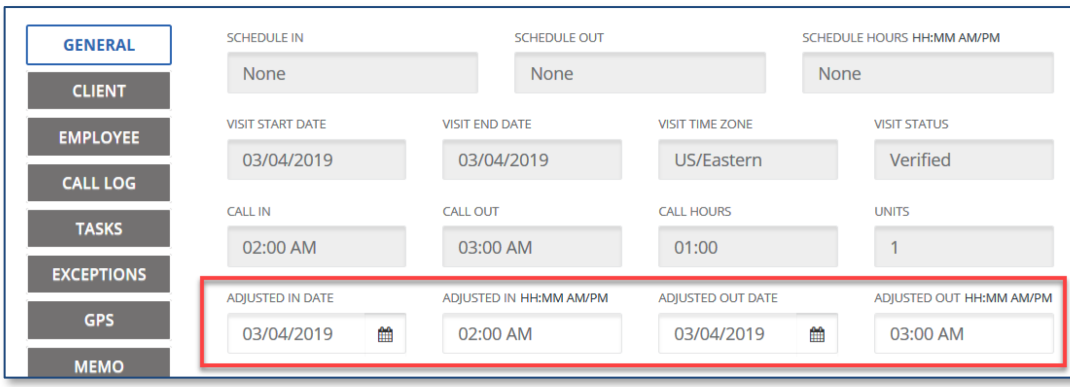


10. Click the **EXCEPTIONS** screen to review and clear the exceptions for the visit. (Exceptions will vary based on the client's specified payer)



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.



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.

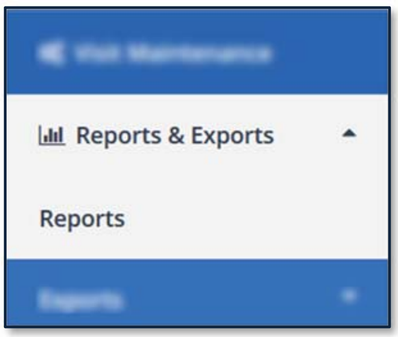
Introduction

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.

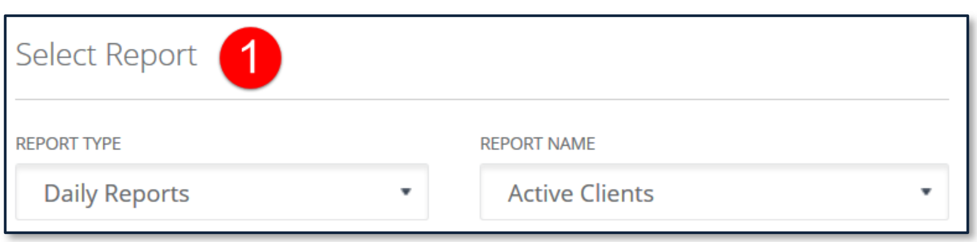


Reports – Main Window Elements

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

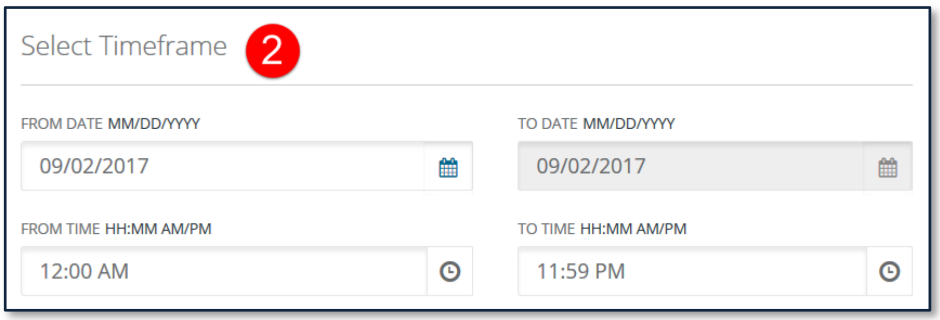
   TIP: The reports listed in the **REPORT NAME** field change based on the **REPORT TYPE** category selected.

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



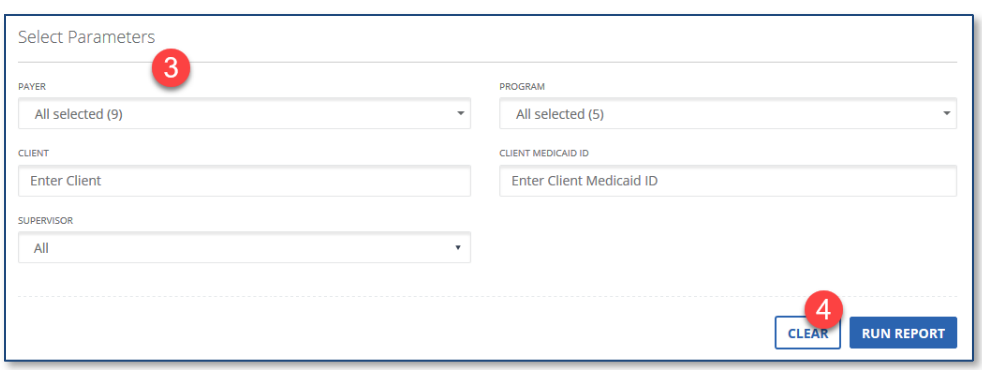
2. **Select Timeframe** Select the time and/or date range of the reports being run.

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

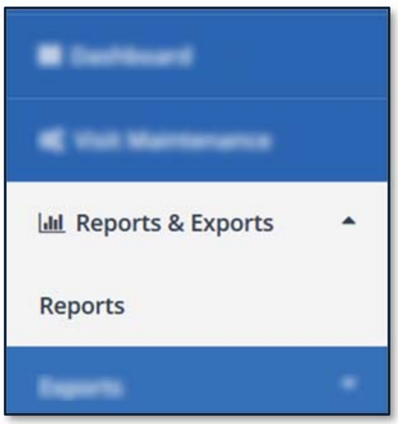


4. **Run Report** Runs the report based upon the selected criteria.

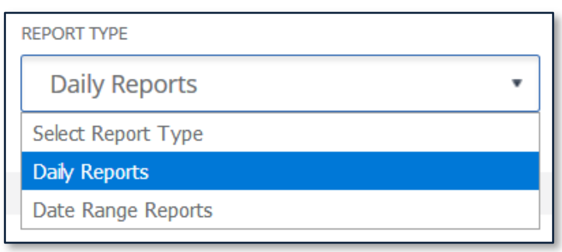
Running a report

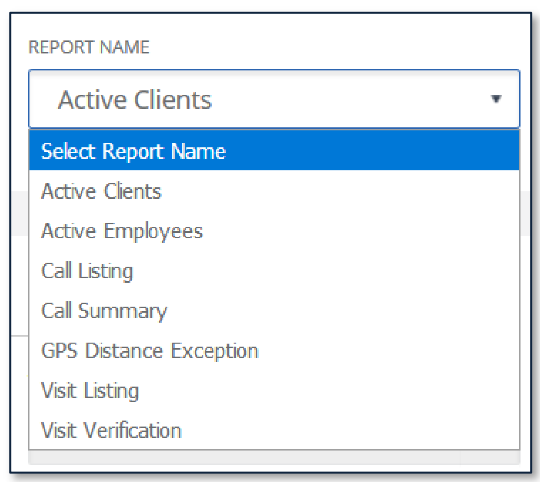
Follow along with the instructor to run a report.

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



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

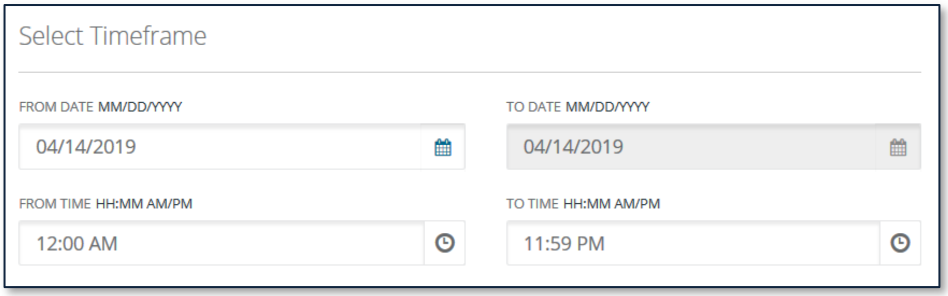




TIP

Available reports differ depending upon which report type is selected**.**

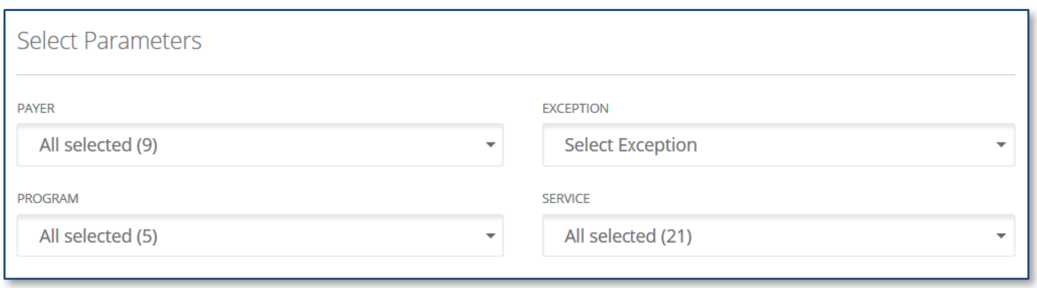
3. Enter **Select Timeframe** information.



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.



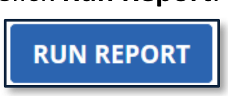
The **SUPERVISOR** field is not necessary to run the report. Entering a **CLIENT** or **CLIENT MEDICAID ID** narrows the results to just that client.

TIP

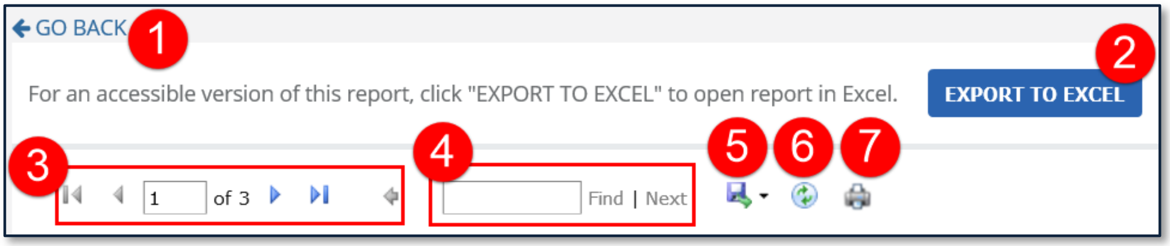
Parameters vary based on the report selected.

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**.

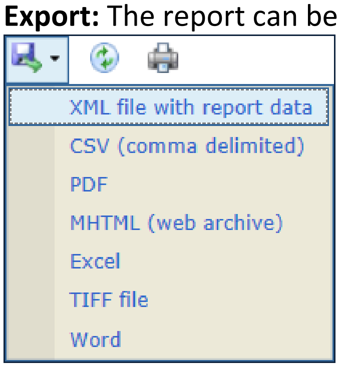
5. Click **Run Report**. The *Preview Report* screen opens.



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:



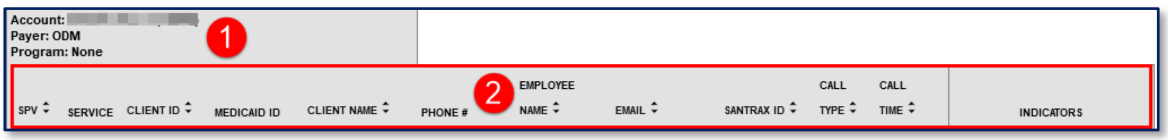
TIP

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

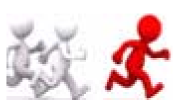


1. **Report Grouping Tab:** This tab displays general information pertaining to the report as well as the sections for grouped reports.
2. **Column Header:** Clicking a column's header will sort the results in either ascending or descending order based on that column's content.

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

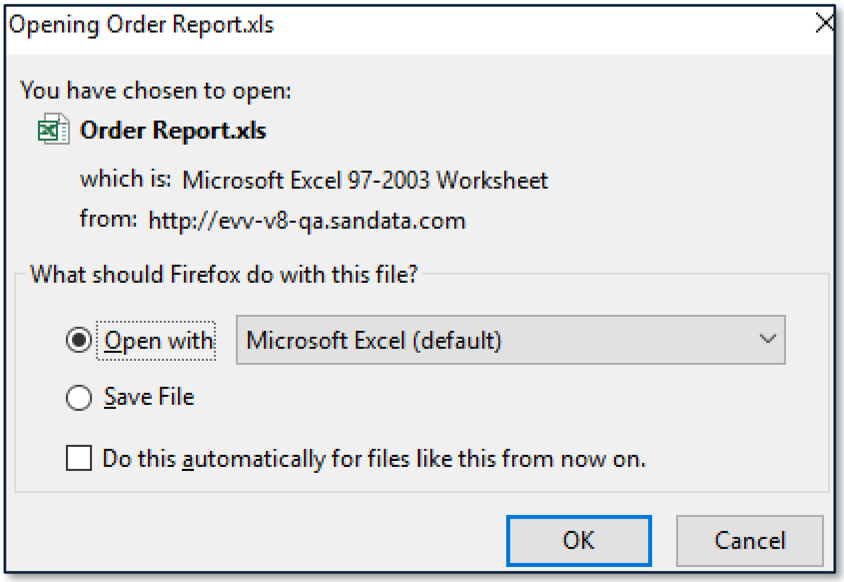
When a column is sorted, a visual indicator (/) reveals which column and in which order it is sorted.

Export a Report

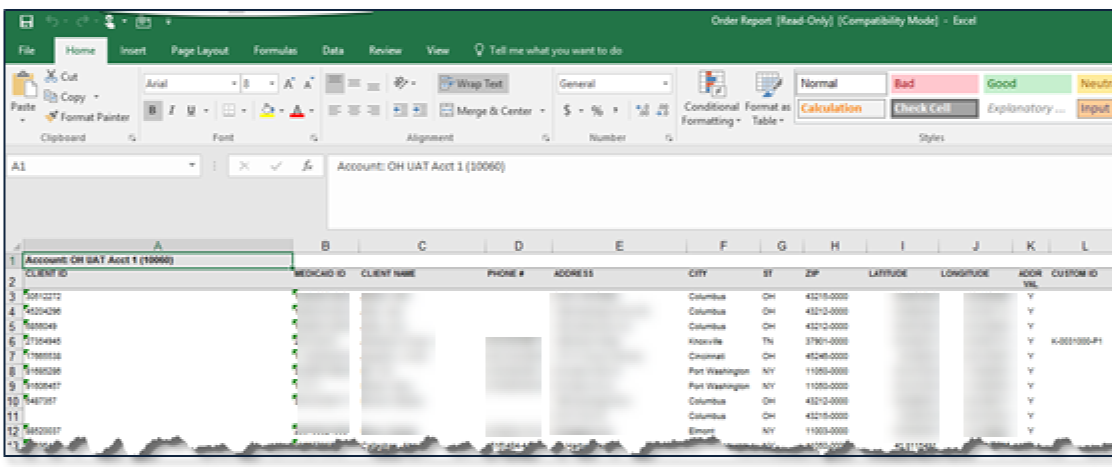


Follow along with the instructor to export a report.

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



2. 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.

Report Parameters
Account: 9634
For: 3/7/2019 - 3/7/2019 11:59:59 PM

ACTIVE CLIENTS

Account: Provider Training-Agency 39 (9634)

CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	ADDRESS	CITY	ST	ZIP	LATITUDE	LONGITUDE	CLIENT ALTERNATE ID
[illegible]	[illegible]	[illegible]		[illegible]	Whitehall	OH	43213-0000	39.969479	-82.88787490	
[illegible]		[illegible]	[illegible]							
[illegible]		[illegible]								
[illegible]		[illegible]	[illegible]							
[illegible]	[illegible]	[illegible]		[illegible]	Columbus	OH	43219-0000	39.99078480000001	-82.94719529999999	
[illegible]		[illegible]	[illegible]							

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).

Report Parameters
Account: OHIO QA Template Agency 1(10010)
For: 3/4/2019 12:00:00 PM - 3/4/2019 12:00:59 PM

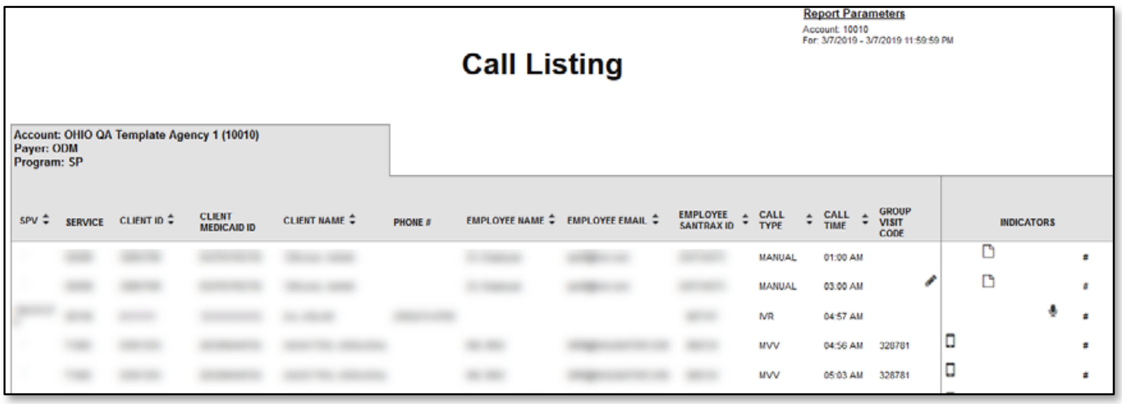
ACTIVE EMPLOYEES

Account: OHIO QA Template Agency 1 (10010)

EMPLOYEE ID	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE SANTRAX ID	PHONE #	DEP
[illegible]	[illegible]	[illegible]	[illegible]	-	-
[illegible]	[illegible]	[illegible]	[illegible]	-	-
[illegible]	[illegible]	[illegible]	[illegible]	-	-
[illegible]	[illegible]	[illegible]	[illegible]	-	-
[illegible]	[illegible]	[illegible]	[illegible]	-	-

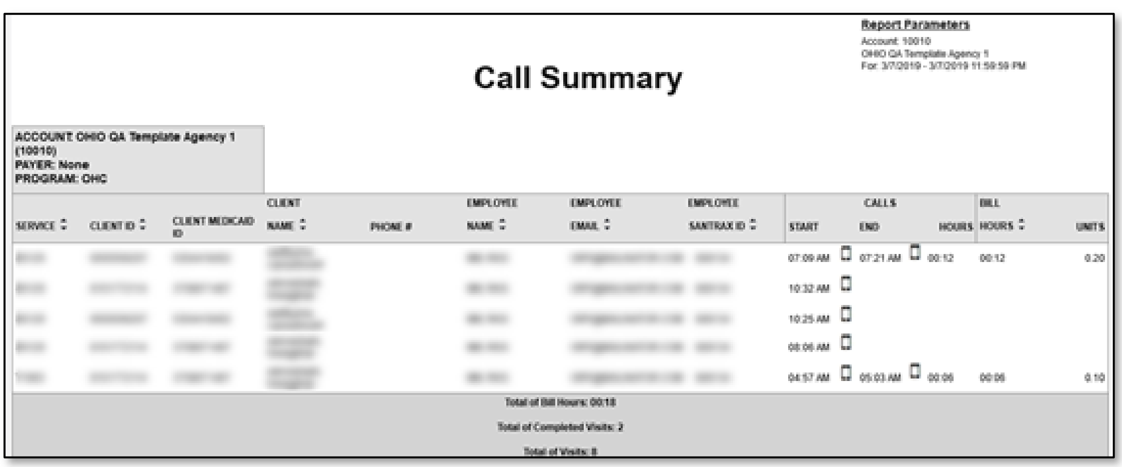
3. **Call Listing Report:** This report displays all call activity from all available call methods for the selected day and time range specified. The calls are listed one after another individually with the beginning pages listing calls with missing data.

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.



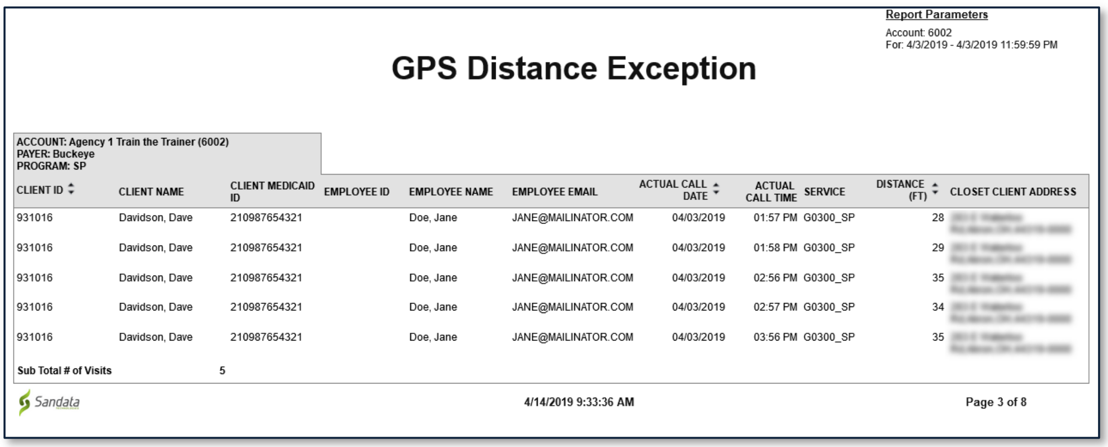
4. **Call Summary Report:** This report pairs the Start and End calls and calculates the hours worked.

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.



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.



Report Parameters
Account: 6002
For: 4/3/2019 - 4/3/2019 11:59:59 PM

GPS Distance Exception

ACCOUNT: Agency 1 Train the Trainer (6002)
PAYER: Buckeye
PROGRAM: SP

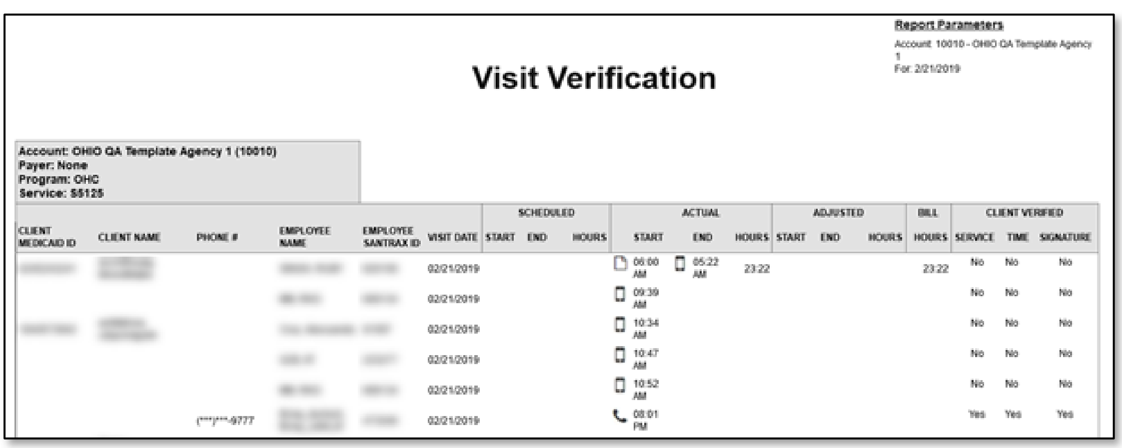
CLIENT ID	CLIENT NAME	CLIENT MEDICAID ID	EMPLOYEE ID	EMPLOYEE NAME	EMPLOYEE EMAIL	ACTUAL CALL DATE	ACTUAL CALL TIME	SERVICE	DISTANCE (FT)	CLOSET CLIENT ADDRESS
931016	Davidson, Dave	210987654321		Doe, Jane	JANE@MAILINATOR.COM	04/03/2019	01:57 PM	G0300_SP	28	[illegible]
931016	Davidson, Dave	210987654321		Doe, Jane	JANE@MAILINATOR.COM	04/03/2019	01:58 PM	G0300_SP	29	[illegible]
931016	Davidson, Dave	210987654321		Doe, Jane	JANE@MAILINATOR.COM	04/03/2019	02:56 PM	G0300_SP	35	[illegible]
931016	Davidson, Dave	210987654321		Doe, Jane	JANE@MAILINATOR.COM	04/03/2019	02:57 PM	G0300_SP	34	[illegible]
931016	Davidson, Dave	210987654321		Doe, Jane	JANE@MAILINATOR.COM	04/03/2019	03:56 PM	G0300_SP	35	[illegible]

Sub Total # of Visits 5

Sandata 4/14/2019 9:33:36 AM 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.



Report Parameters
Account: 10010 - OHIO QA Template Agency 1
For: 2/21/2019

Visit Verification

Account: OHIO QA Template Agency 1 (10010)
Payer: None
Program: OHC
Service: S5125

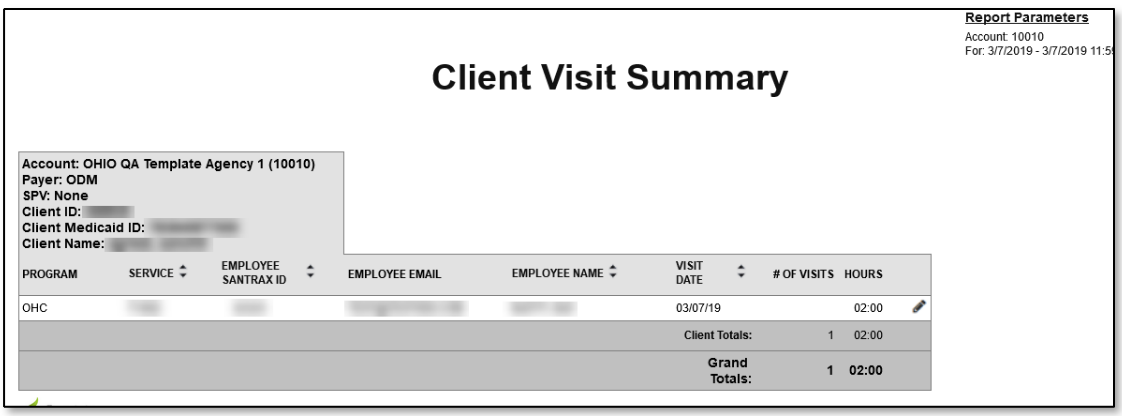
						SCHEDULED			ACTUAL			ADJUSTED			BILL	CLIENT VERIFIED		
CLIENT MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	EMPLOYEE SANTRAX ID	VISIT DATE	START	END	HOURS	START	END	HOURS	START	END	HOURS	HOURS	SERVICE	TIME	SIGNATURE
[illegible]	[illegible]		[illegible]	[illegible]	02/21/2019				06:00 AM	05:22 AM	23:22				23:22	No	No	No
			[illegible]	[illegible]	02/21/2019				09:39 AM							No	No	No
[illegible]	[illegible]		[illegible]	[illegible]	02/21/2019				10:34 AM							No	No	No
			[illegible]	[illegible]	02/21/2019				10:47 AM							No	No	No
			[illegible]	[illegible]	02/21/2019				10:52 AM							No	No	No
		(***)***-9777	[illegible]	[illegible]	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.



Report Parameters
Account: 10010
For: 3/7/2019 - 3/7/2019 11:5

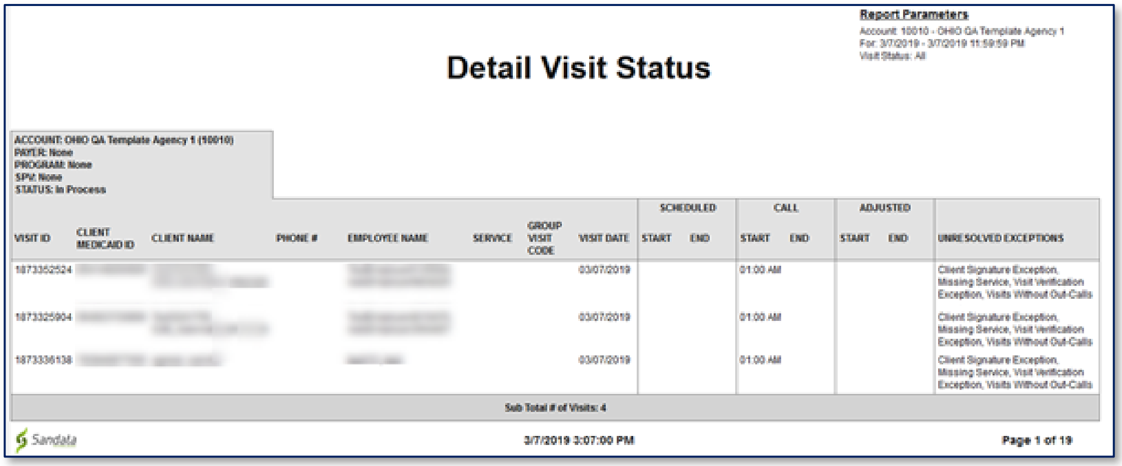
Client Visit Summary

Account: OHIO QA Template Agency 1 (10010)
Payer: ODM
SPV: None
Client ID: [illegible]
Client Medicaid ID: [illegible]
Client Name: [illegible]

PROGRAM	SERVICE	EMPLOYEE SANTRAX ID	EMPLOYEE EMAIL	EMPLOYEE NAME	VISIT DATE	# OF VISITS	HOURS
OHC	[illegible]	[illegible]	[illegible]	[illegible]	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.



Detail Visit Status

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

ACCOUNT: OHIO QA Template Agency 1 (10010)
PAYER: None
PROGRAM: None
SPV: None
STATUS: In Process

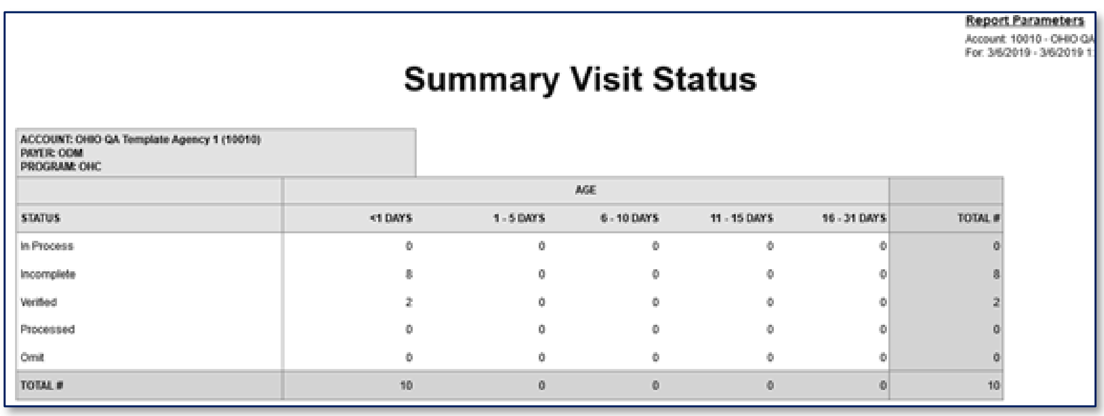
								SCHEDULED		CALL		ADJUSTED		
VISIT ID	CLIENT MEDICAID ID	CLIENT NAME	PHONE #	EMPLOYEE NAME	SERVICE	GROUP VISIT CODE	VISIT DATE	START	END	START	END	START	END	UNRESOLVED EXCEPTIONS
1873352524	[illegible]	[illegible]		[illegible]			03/07/2019			01:00 AM				Client Signature Exception, Missing Service, Visit Verification Exception, Visits Without Out-Calls
1873325904	[illegible]	[illegible]		[illegible]			03/07/2019			01:00 AM				Client Signature Exception, Missing Service, Visit Verification Exception, Visits Without Out-Calls
1873336138	[illegible]	[illegible]		[illegible]			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.



Summary Visit Status

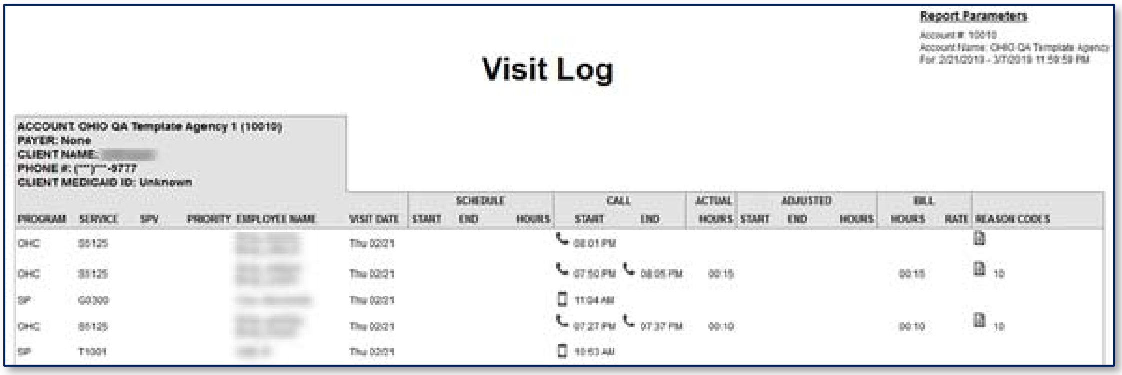
Report Parameters
Account: 10010 - OHIO QA
For: 3/6/2019 - 3/6/2019 1

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

	AGE					
STATUS	<1 DAYS	1 - 5 DAYS	6 - 10 DAYS	11 - 15 DAYS	16 - 31 DAYS	TOTAL #
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

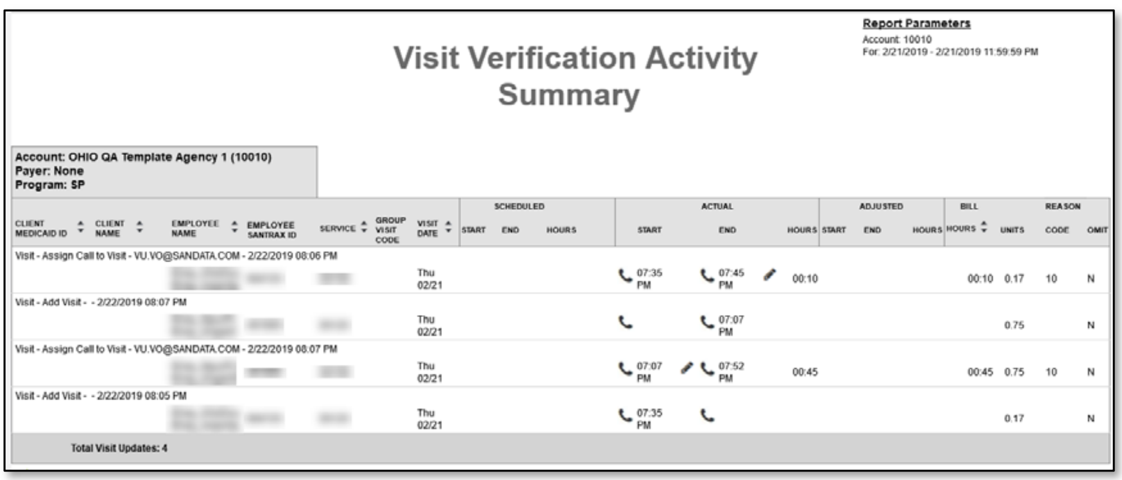
4. **Visit Log Report:** All visits associated with each client within the selected date range are listed with one client per page in this report.

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



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.

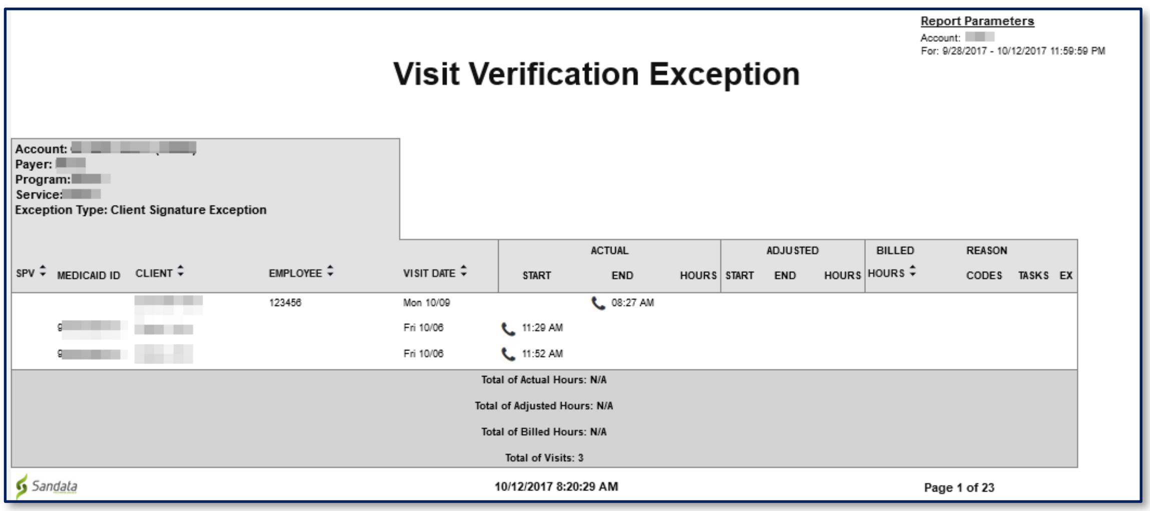
Use this report to review visit modifications. It includes what change was made, who made the change, when and why the change was made and the reason code related to the change.



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

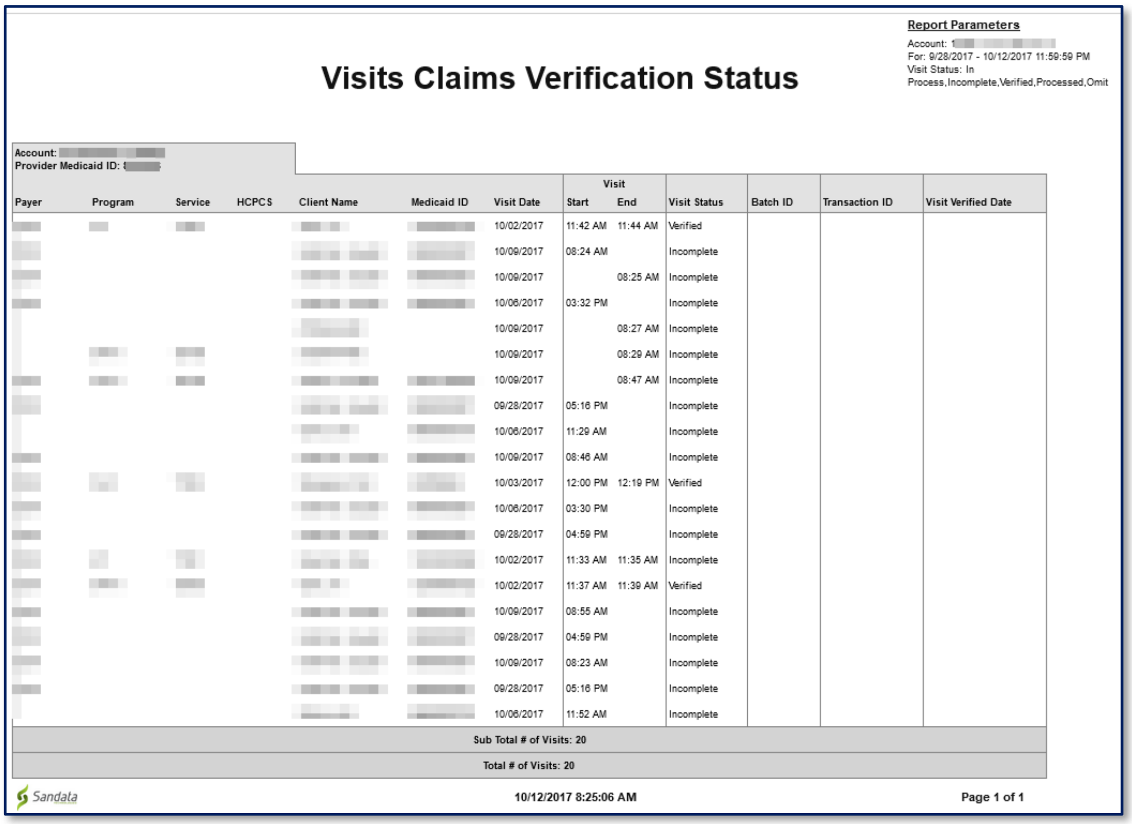
					ACTUAL			ADJUSTED			BILLED	REASON		
SPV	MEDICAID ID	CLIENT	EMPLOYEE	VISIT DATE	START	END	HOURS	START	END	HOURS	HOURS	CODES	TASKS	EX
		[redacted]	123456	Mon 10/09		08:27 AM								
	9[redacted]	[redacted]		Fri 10/06	11:29 AM									
	9[redacted]	[redacted]		Fri 10/06	11:52 AM									

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

7. **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: 1
For: 9/28/2017 - 10/12/2017 11:59:59 PM
Visit Status: In Process,Incomplete,Verified,Processed,Omit

Account:
Provider Medicaid ID:

Payer	Program	Service	HCPCS	Client Name	Medicaid ID	Visit Date	Visit Start	Visit End	Visit Status	Batch ID	Transaction ID	Visit Verified Date
						10/02/2017	11:42 AM	11:44 AM	Verified			
						10/09/2017	08:24 AM		Incomplete			
						10/09/2017		08:25 AM	Incomplete			
						10/06/2017	03:32 PM		Incomplete			
						10/09/2017		08:27 AM	Incomplete			
						10/09/2017		08:29 AM	Incomplete			
						10/09/2017		08:47 AM	Incomplete			
						09/28/2017	05:16 PM		Incomplete			
						10/06/2017	11:29 AM		Incomplete			
						10/09/2017	08:46 AM		Incomplete			
						10/03/2017	12:00 PM	12:19 PM	Verified			
						10/06/2017	03:30 PM		Incomplete			
						09/28/2017	04:59 PM		Incomplete			
						10/02/2017	11:33 AM	11:35 AM	Incomplete			
						10/02/2017	11:37 AM	11:39 AM	Verified			
						10/09/2017	08:55 AM		Incomplete			
						09/28/2017	04:59 PM		Incomplete			
						10/09/2017	08:23 AM		Incomplete			
						09/28/2017	05:16 PM		Incomplete			
						10/06/2017	11:52 AM		Incomplete			
Sub Total # of Visits: 20												
Total # of Visits: 20												

Sandata 10/12/2017 8:25:06 AM Page 1 of 1

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 like services 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.

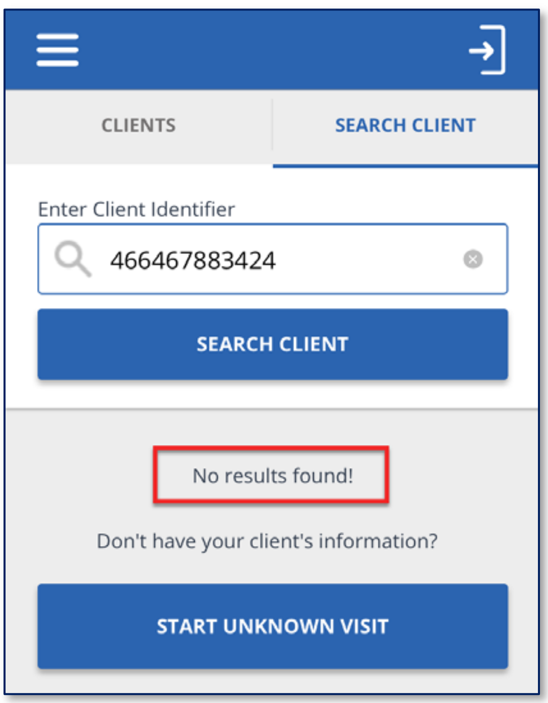
The Group Visit option allows one employee to call-in and call-out for one or more client visits at the same time, or multiple employees to call-in and call-out for one or more client visits at the same time. Group visits can be captured via SMC, TVV and EVV Visit Maintenance.

Sandata Mobile Connect (SMC)

Starting a new Group Visit

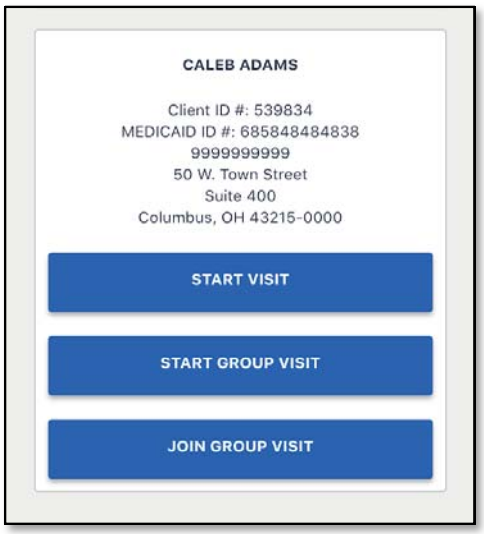
When the employee arrives to provide care to the client(s), he or she will:

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).

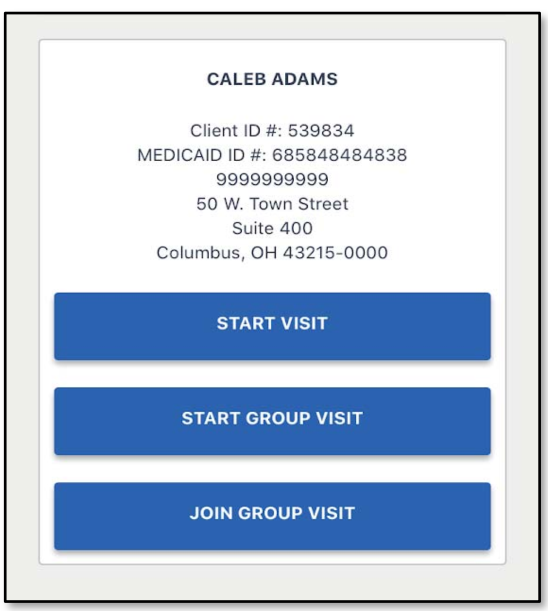


When the client details display, there are options to **START VISIT**, **START GROUP VISIT** or **JOIN GROUP VISIT**.

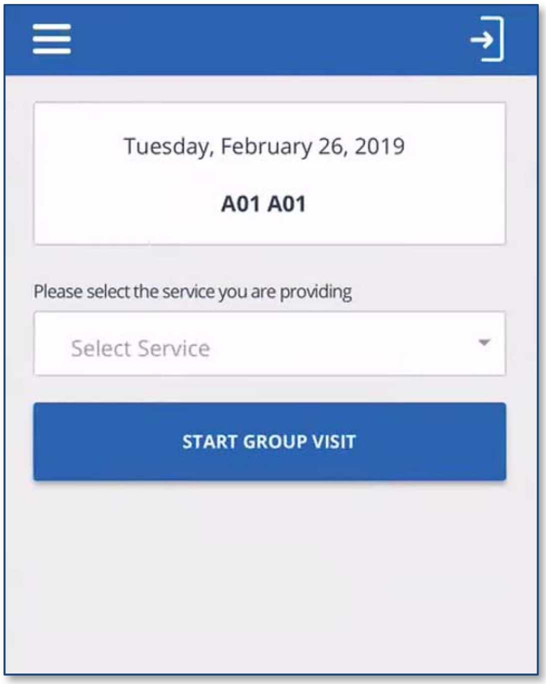
- **START VISIT**: this option allows the employee to start a single client visit.
- **START GROUP VISIT**: this option allows an employee to start a new group visit and add clients to the group visit.
- **JOIN GROUP VISIT**: this option allows an employee to join an existing group visit started by another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



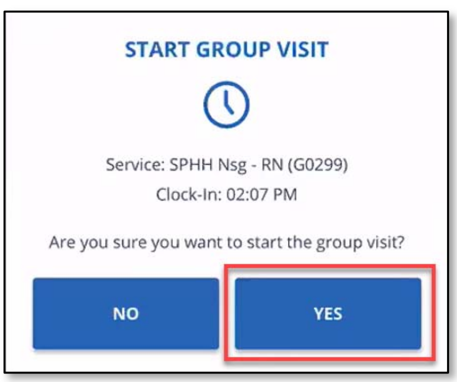
5. Tap **START GROUP VISIT.**



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**.

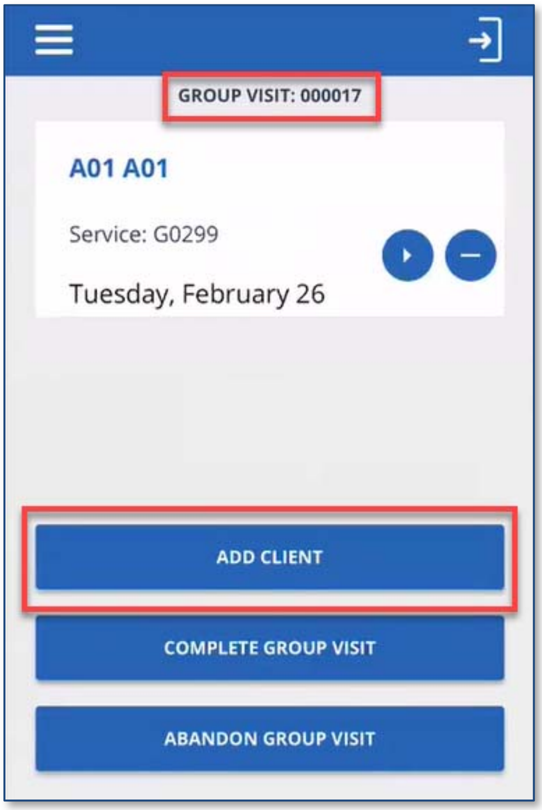


The visit is in progress and a Group Visit code is generated. This 6-digit code is used to identify all clients at a location who are receiving care from one or more employees from the same provider agency.

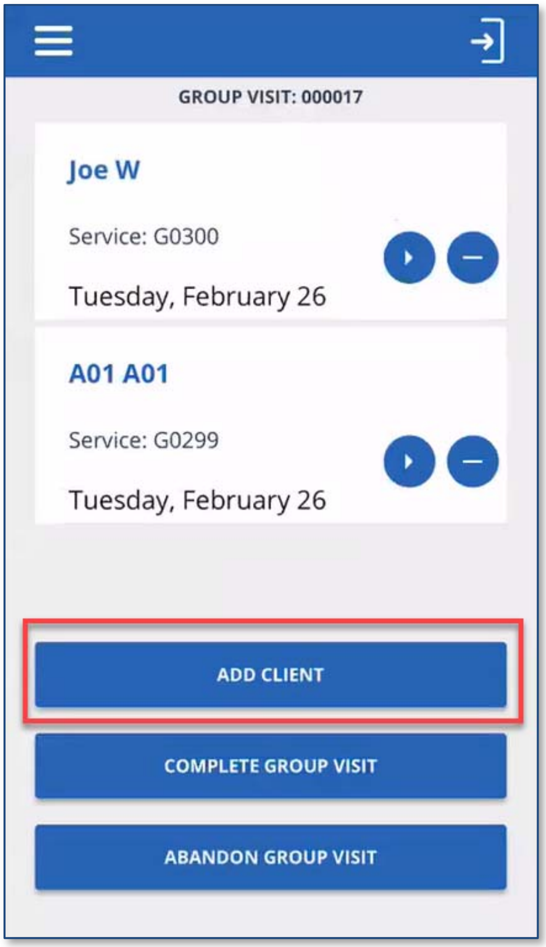
The employee may add additional clients they are providing care for the group visit.

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.

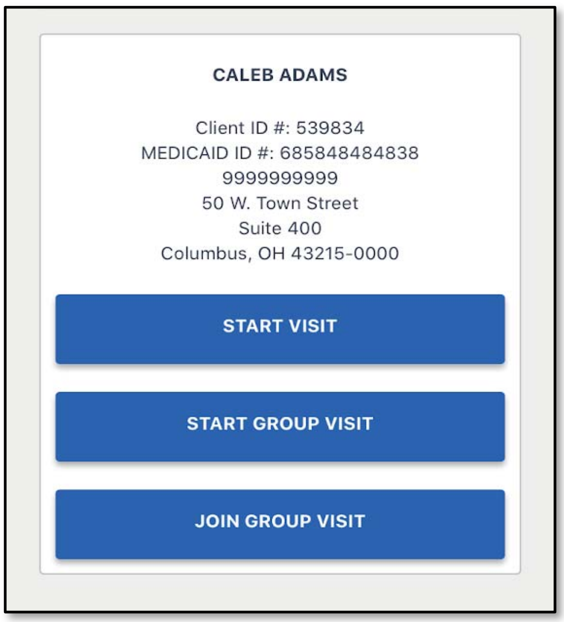
There is no limit to the number of known clients an employee can add to a group visit, or the number of employees who can join a group visit. However, an employee can only add one unknown client to a group visit.

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.

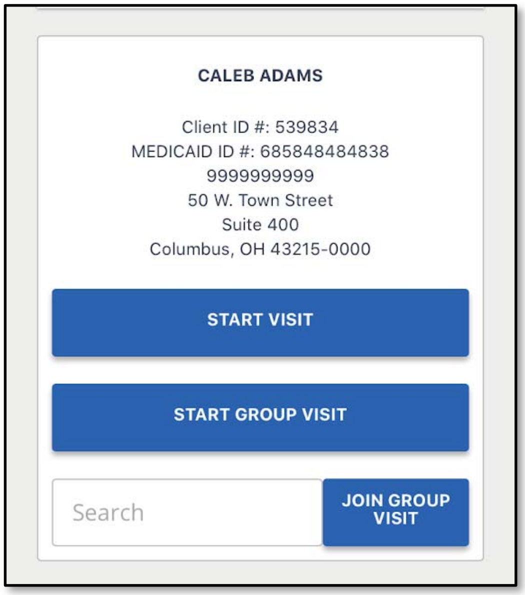
Joining a Group Visit

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

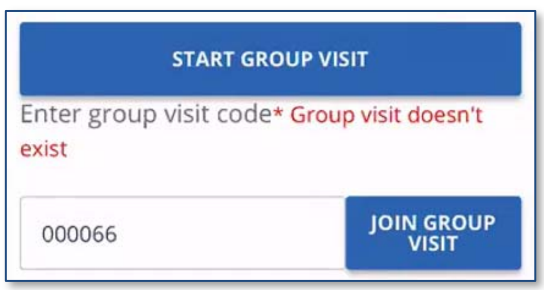
1. Locate the EVV Device or the employee's personal device.
2. Log in to SMC.
3. Tap in the **ENTER CLIENT IDENTIFIER** search field and enter the 12-digit Medicaid ID of the client.
4. Tap the **SEARCH CLIENT** button. (If the ID entered does not match to any client, a "No results found" message displays).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



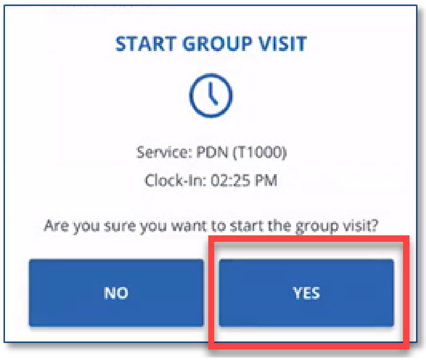
6. Enter the 6-digit group visit code and tap **JOIN GROUP VISIT**.



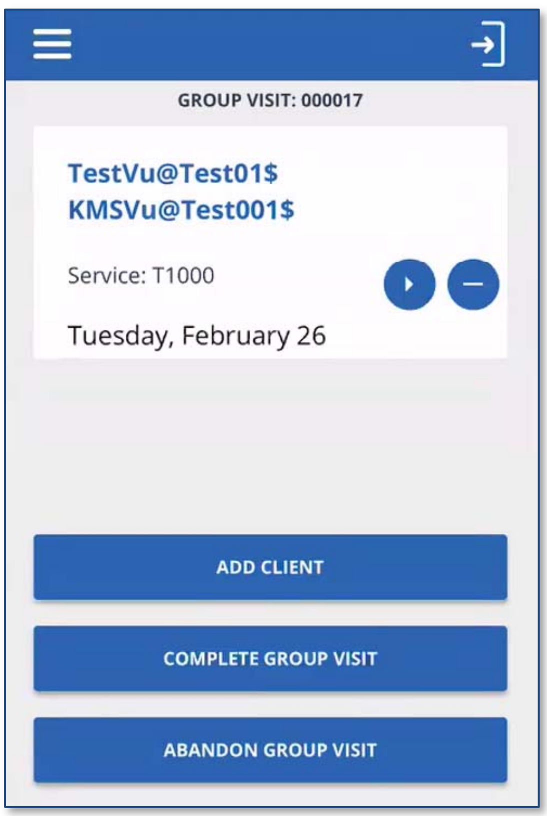
- The Group Visit code must be 6-digits in length.
- The code is only valid for use within the same agency.
- If an invalid code is entered, the following message is displayed.



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



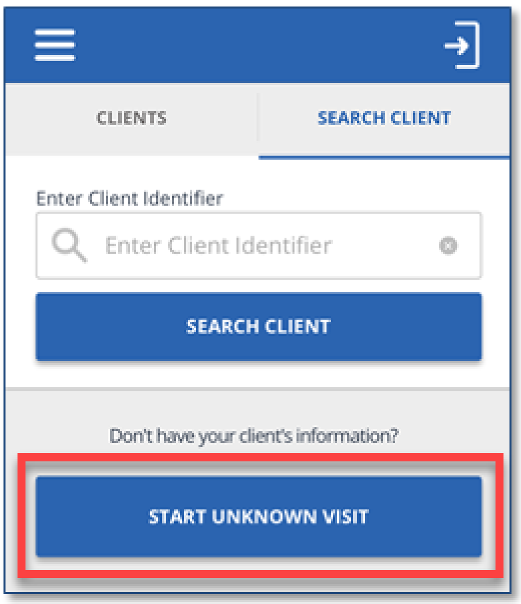
The client is added to the existing in progress Group Visit. The employee may add additional clients or log out of SMC.



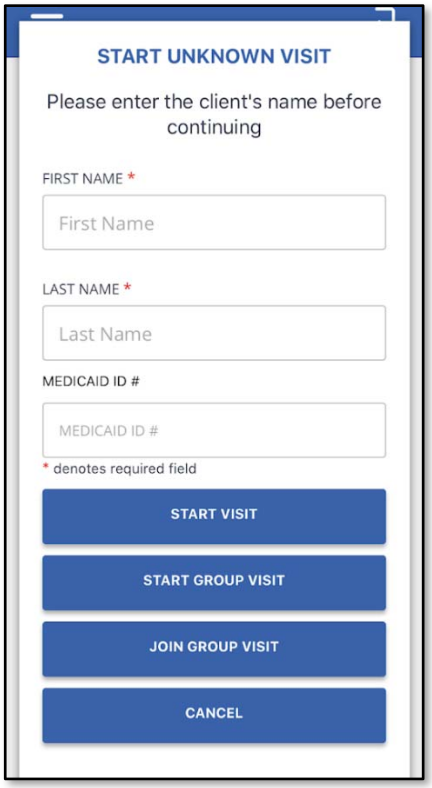
Adding an Unknown Client to a Group Visit

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.

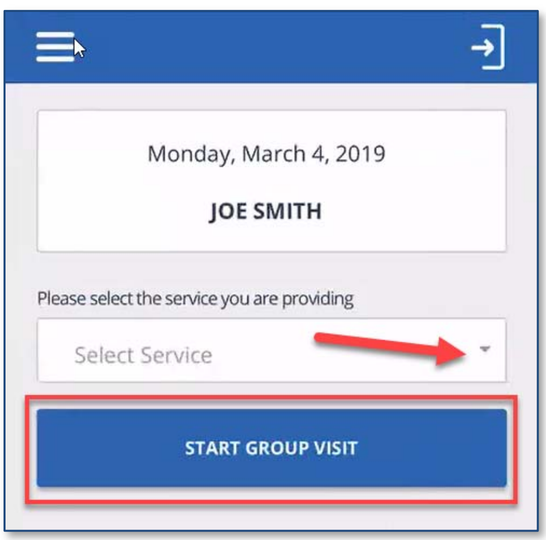
1. From the home screen, Tap **START UNKNOWN VISIT**.



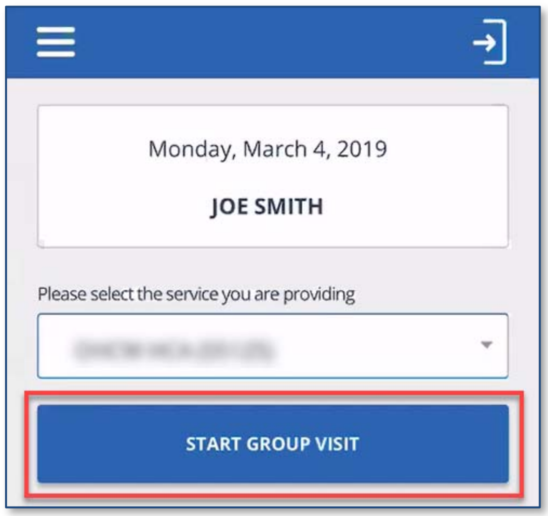
2. Enter the required information and tap **CONTINUE VISIT**.
   - **FIRST NAME** (Required)
   - **LAST NAME** (Required)
   - **MEDICAID ID #** (Optional – if available)



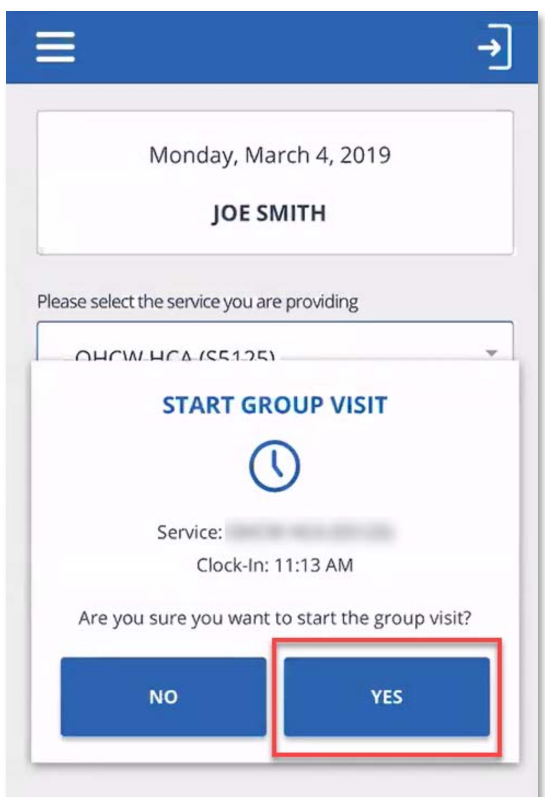
3. Select the Service from the drop-down list and tap **START GROUP VISIT**.



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



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



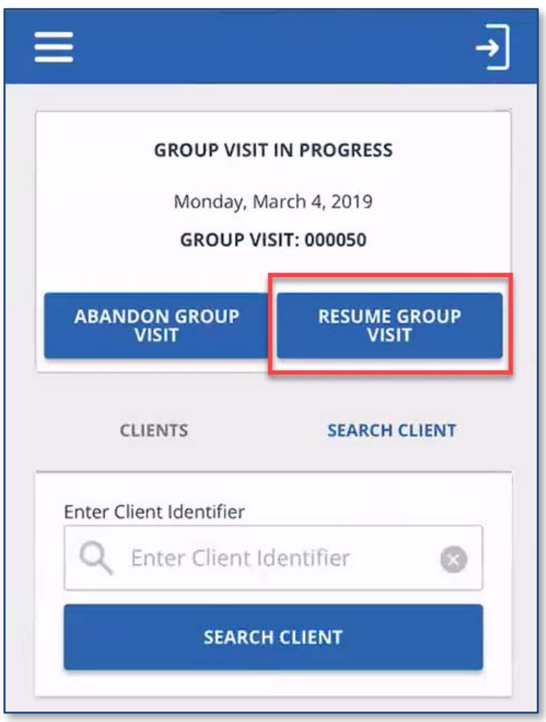
Completing a Group Visit

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

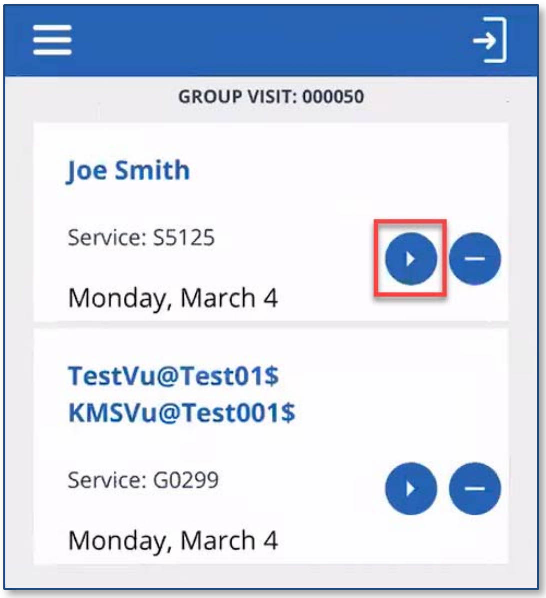
Completing all visits within a group at the same time requires that the visit process is the same for all the clients (e.g. all visits do not require client confirmation during the call-out process). If one or more clients have a different call-out process, the employee must complete the visits individually.

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.

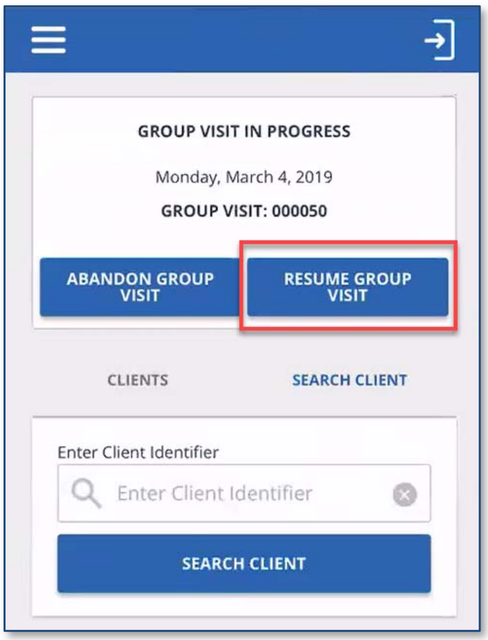


4. Complete the visit following the individual visit process.

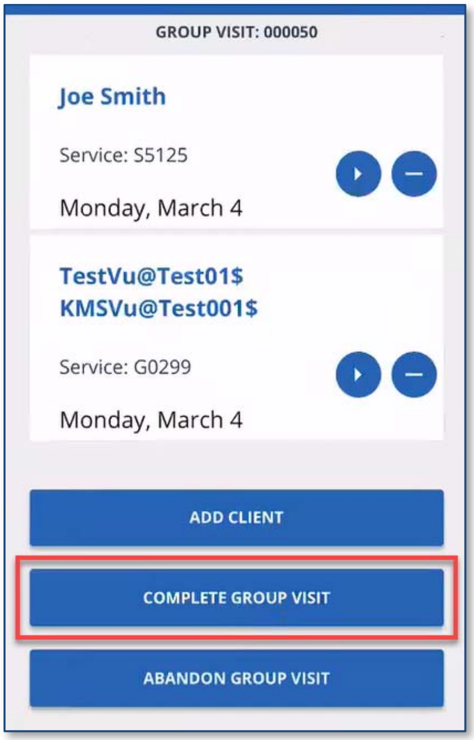
Tapping the ‘dash’ icon () allows the employee to abandon the individual visit. An abandoned visit appears in Sandata EVV as an incomplete visit and must be verified in **Visit Maintenance**.

Completing all visits within a Group Visit Together

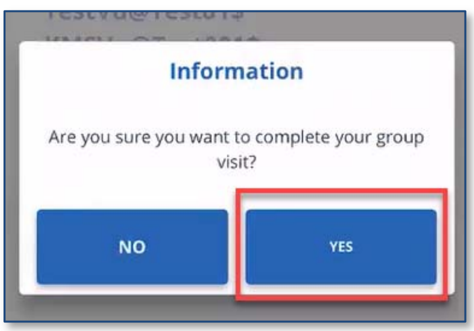
1. Log back in to SMC.
2. Tap **RESUME GROUP VISIT**.



3. Tap **COMPLETE GROUP VISIT**.



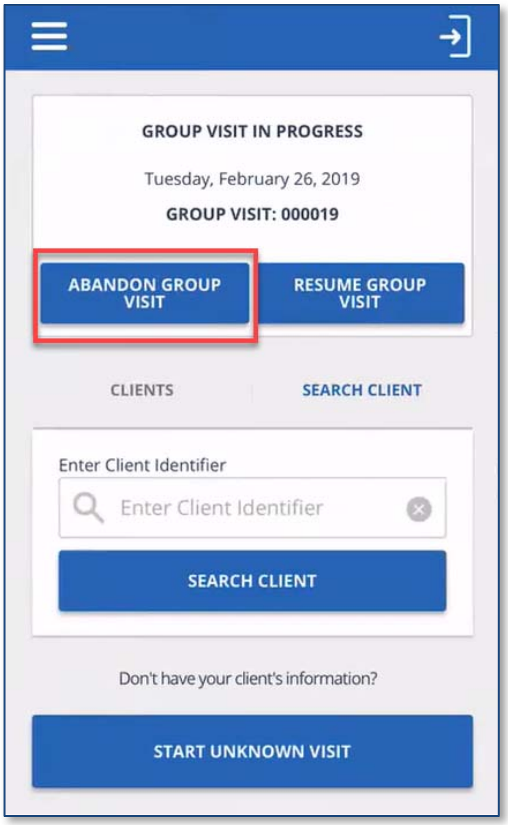
4. Tap **YES** to confirm completion of the group visit.



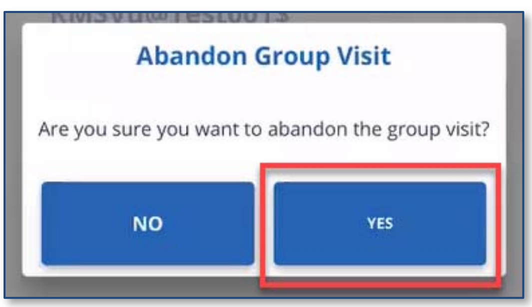
When completing a group visit, the employee is completing his or her client's visits.

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
Call In / Out	Select Service
Change Service	Client Voice Recording
Client Verification: Visit	Client Verification: Service

Calling Instructions **STX«ACCOUNT»**

Calling In: When arriving at the client's home, make sure you have the following information:

- Your Santrax ID.
- Your Client(s) ID.
- Group visit code if available.

1. **Dial any of the toll-free numbers assigned to your agency.**
   If you are experiencing difficulties with the first toll- free number, please use the second toll-free number.

   Santrax will say: **"Welcome, please enter your Santrax ID."**

2. **Press the numbers of your Santrax ID on the touch tone phone.**

   Santrax will say: **"You entered (SANTRAX ID). Press (1) for Yes, (2) for No."**

3. **Press (1) to confirm your Santrax ID or press (2) to retry.**

   Santrax will say: **"Is this a group visit? Press (1) for Yes or (2) for No."**

4. **Press (1) for group visit.**

   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."**

(1) To start a new group visit:

5. **Press (1) to start a new group visit.**

   Santrax will say: **"You will start a new group visit with visit code (GROUP CODE)."**

6. **Continue to step 7.**

(3) To join an existing group visit:

5. **Press (3) to join an existing group visit.**

   Santrax will say: **"Please enter the group visit code."**

6. **Press the numbers of the group visit code.**

   Santrax will say: **"You will join the 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."

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".**

Calling Instructions **STX«ACCOUNT»**

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 1 thru 4 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."**

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."**

Calling Instructions **STX«ACCOUNT»**

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: **"Would you like to continue the visit with the new service?"**

19. **Press the (1) for Yes or to (2) for No**

Note:
When switching to a different service for the same client please press (1) for Yes and repeat steps 17-18 to enter the next service before continuing. Press (2) for No when all services are complete.

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."**

20. **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 25.

21. **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."**

22. **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."**

23. **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."**

24. **The client should press the appropriate option.**

Santrax will say: **"Please enter second client ID or hang up if done."**

25. Repeat steps 15 thru 24 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: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
	Press 1 for Yes.
	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."*
4	Press 1 to start a new group visit.
	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."*
5	Press 1 to add a client.
	Santrax will say: *"Press 1 to call-in or 2 to call-out."*
6	Press 1 to call-in.
	Santrax will say: *"Received at [Time]. Please enter first client ID or hang up if done."*
7	Enter the client ID for the first client being added to the group visit.
	Santrax will say: *"Enter second client ID or hang up if done."* ***** *****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: *"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: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
4	Press 1 for Yes.
	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 menu."*
5	Press 2 to continue the group visit.
	Santrax will say: *"Please enter the group visit code."* * *If the code entered is not valid, Santrax will say: *"You have entered an invalid visit code. Please try again."*
6	Enter the 6-digit group visit code.
	Santrax will say: *"You will continue the group visit with visit code [XXXXX]. 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."*
7	Press 2 to complete the visit.
	Santrax will say: *"Please select 1 to call-in or 2 to call out."*
8	Press 2 to call-out.
	Santrax will say: "Received at [Time]. Please enter first client ID or hang up if done."
9	Enter the client ID number.
	Santrax will say: "Please enter the Service ID."
10	Press the three-digit ID of the care performed.
	Santrax will say: "You entered [Service]. Please press 1 to accept, 2 to retry."
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.
	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)."* **Each prompt will be heard in its respective language.*
2	Press the number that corresponds to the desired language.
	Santrax will say*: "Welcome, please enter your Santrax ID."*
3	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."*
4	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
5	Press 1 for Yes.
	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."*
6	Press 1 to start a new group visit.
	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."*
7	Press 1 to add a client.
	Santrax will say*: "Press 1 to call-in or 2 to call-out."*
8	Press 1 to call-in.
	Santrax will say*: "Received at [Time]. Please enter first client ID or hang up if done."*
9	Enter the client ID for the first client being added to the group visit.

	Santrax will say: *"Enter second client ID or hang up if done."* ***** *****Repeat step 9 for each client being added to the group visit.
10	Hang up.

Call-Out	
1	Dial either English toll-free number.
	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). **Each prompt will be heard in its respective language.*
2	Press the number that corresponds to the desired language.
	Santrax will say*: "Welcome, please enter your Santrax ID."*
3	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."*
4	Press 1 for Yes.
	Santrax will say: *"Is this a Group Visit, press 1 for Yes or 2 for No."*
5	Press 1 for Yes.
	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 menu."*
6	Press 2 to continue the group visit.
	Santrax will say: *"Please enter the group visit code." ** *If the code entered is not valid, Santrax will say: *"You have entered an invalid visit code. Please try again."*
7	Enter the 6-digit group visit code.
	Santrax will say*: "You will continue the group visit with visit code [XXXXX]. 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."*
8	Press 2 to complete the visit.
	Santrax will say: *"Please select 1 to call-in or 2 to call out."*
9	Press 2 to call-out.

	Santrax will say: "Received at [Time]. Please enter first client ID or hang up if done."
10	Enter the client ID number.
	Santrax will say: "Please enter the Service ID."
11	Press the three-digit ID of the care performed (Service IDs are listed on the back of the Call Reference Guide).
	Santrax will say: "You entered [Service]. Please press 1 to accept, 2 to retry."
12	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 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 10 – 12 for each additional client in the group)** Hang up when the last client has been entered.

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."*

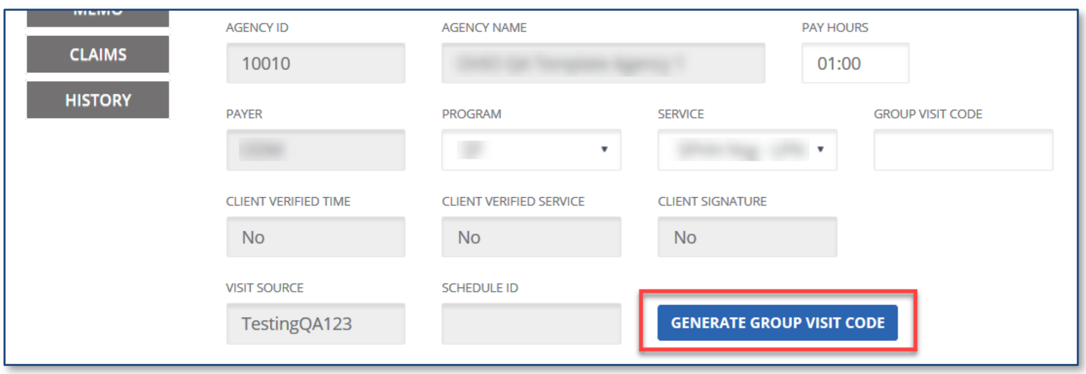
Presss 2 to skip the client visit verification steps, since the functionality does not apply to DODD clients. Repeat this for each DODD client associated with the call.

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.



Editing a Code

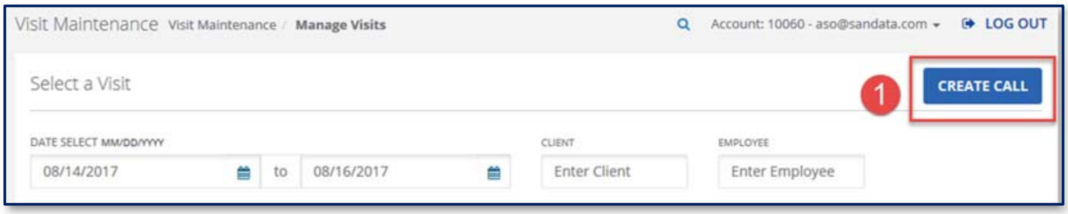
If a visit is linked to an incorrect group visit or was supposed to be part of an existing group visit, a user can edit the existing code in the **GROUP VISIT CODE** field on the General screen of the Visit Details.

If the code entered is not a valid group visit code, an invalid group visit code message displays.

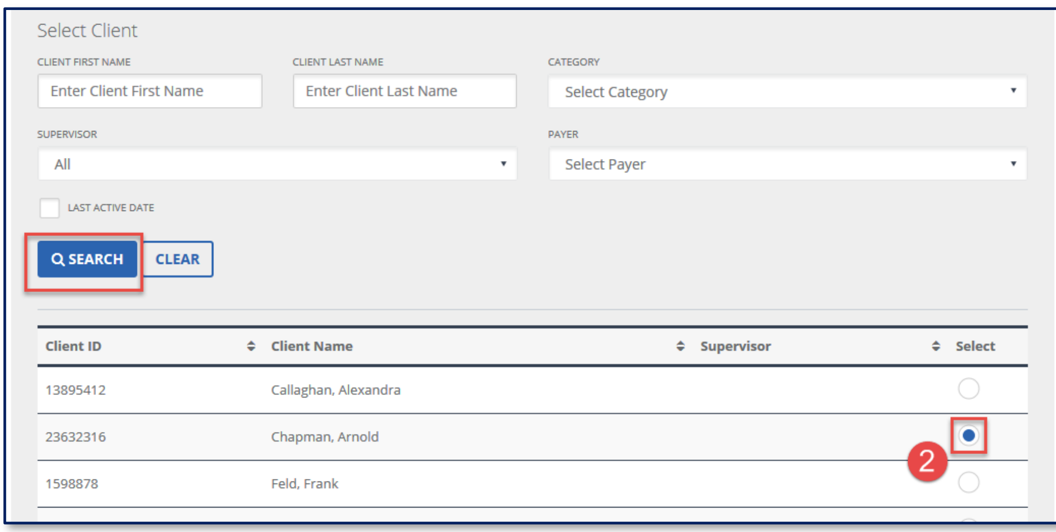
Create Call

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.

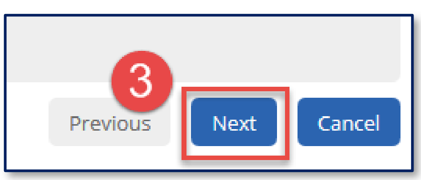
1. Click **CREATE CALL** on the *Visit Maintenance* screen.



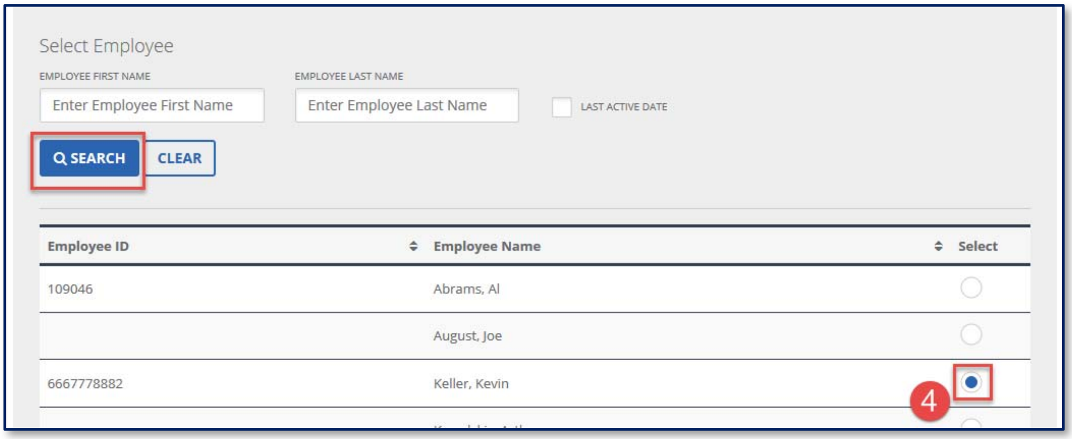
2. Search for and select a client.



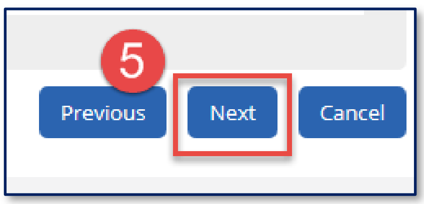
3. Click **Next.**



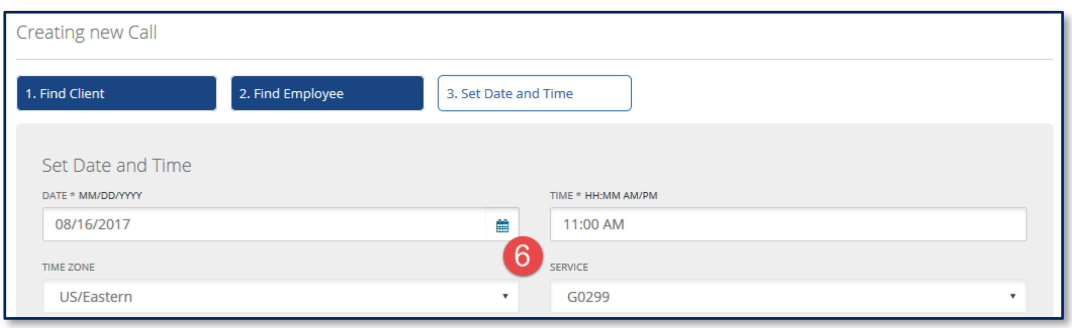
4. Search for and select an employee.



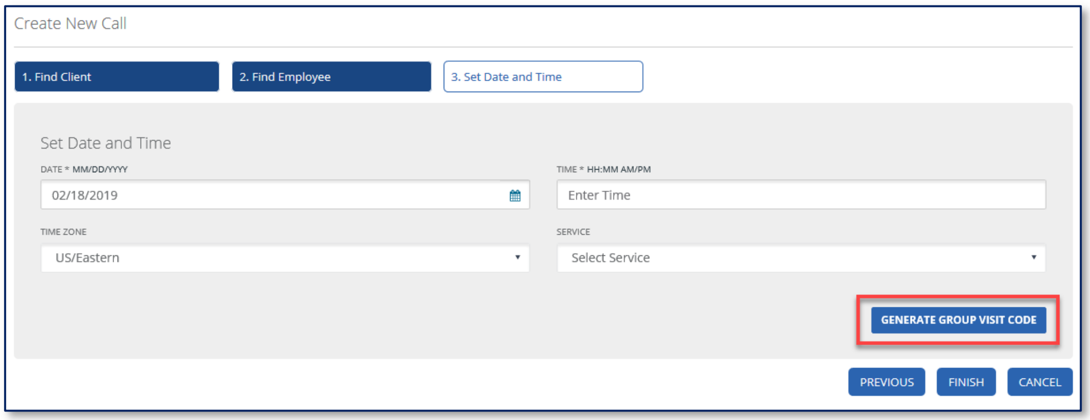
5. Click **Next.**

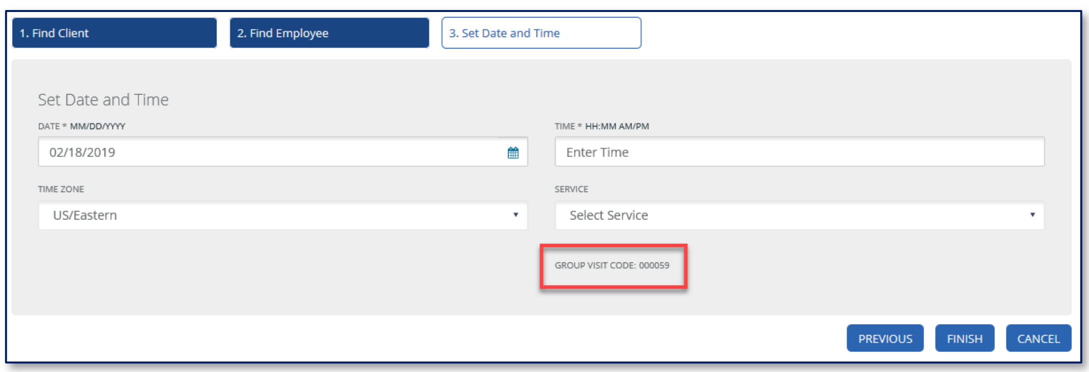


6. Enter the **DATE***, **TIME*** and **SERVICE** details.



7. If creating a group visit call, click the **GENERATE GROUP VISIT CODE** button to obtain a group visit number.





8. Click **FINISH**.

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.

C

Client/Individual	A person who receives services through the Medicaid program

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

M

Manual Call	Corrective action for the visit exception Visit Without In-Call/Visit Without Out-Call.
MCO	Managed Care Organization
MITS	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
OHCW	Ohio Home Care Waiver

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#
  - o https://etraconline.net/login.
  - o Refer to your training completion email for reference and eTRAC chapter in the training manual
- ☐ Download Welcome Kit (EVV log-in credentials and Call Reference Guide)
- ☐ Log into EVV
  - o Input Users and Define Roles
  - o 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 provisioned device or App)
    - ▪ Supply employees with Call Reference Guides for TVV, Santrax ID and Client ID for individuals
  - o Input Clients/Individuals
    - ▪ Order Devices for Individuals
    - ▪ Select payers, programs, and services

Important Resources

- o EVV Provider Hotline number 855-805-3505
- o EVV Provider Hotline email ODMCustomerCareEmail@sandata.com
- o ODM EVV website for FAQ's, Welcome to EVV Video and other important program updates www.medicaid.ohio.gov/EVV
- o ODM EVV Inbox EVV@medicaid.ohio.gov