



Electronic Visit Verification Guide

*The Employee's guide on how to use the Electronic Visit
Verification system (EVV)*

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The Roles in EVV

- **Employee** = The person **providing** care
 - **Client** = The person **receiving** care
 - **Designee** = A Client's **representative**
 - **Fiscal Intermediary** = vendor that provides wage and benefit processing and other activities
-

The Employee

- The person who comes to the client's home to provide authorized services for the client, known as "**Visits**".
 - The Employee **MUST** check in and check out for each visit using either the **Sandata Mobile Connect App (SMC)** or by using the client's landline **Telephone** to place a toll-free telephone call.
 - Depending on the state requirements, the Employee may have to add **Tasks** (services) performed during each visit.
 - **NOTE:** "**TASKS**" may or may not be applicable for your program.
-

The Client:

- The client is responsible for making sure each home visit is "**Verified**".
- The client will have access to the EVV website to view and manage details about the services they received.

The Designee

- The Designee is a person chosen by the client to handle the client's responsibilities when they are not able to do so for themselves.
 - The Designee will have the same access and permissions to the EVV website as the client.
-

The Fiscal

- The Fiscal Intermediary is a service that performs financial functions on behalf of the client including processing payroll documentation and processing payroll on behalf of employer.
- The information for both the client and the employee in the EVV website is provided by the fiscal and therefore can only be changed by the fiscal.
- In some states the **Visit Maintenance** section will be handled by the fiscal, otherwise, the client will have access to it.

The EVV Website

You will need a computer with an internet connection to access the EVV website.

Please use one of the following supported browsers,

- Microsoft Edge
- Mozilla Firefox
- Google Chrome

NOTE: If accessing the EVV website on a tablet, be aware that the screens may not line up correctly, therefore, we recommend you use either a desktop or laptop computer.

Accessing the Website



- Double-click on your browse icon
- Type the EVV website into the URL field at the top of the page
evv.sandata.com

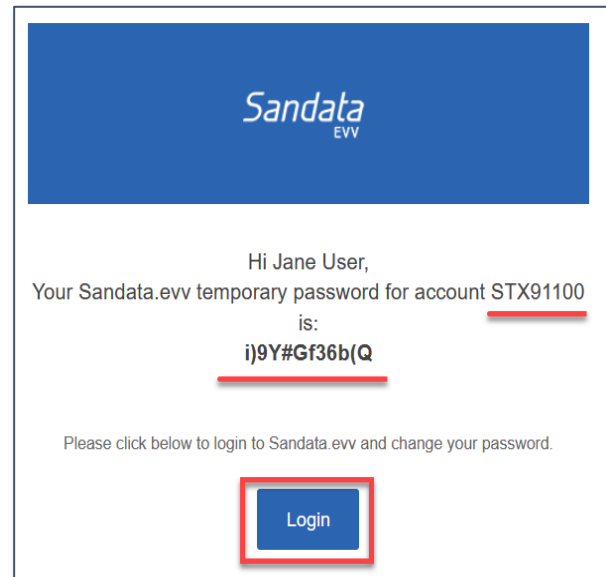


- Press the **ENTER** key
- The website login page will display

How to Log in For the First Time

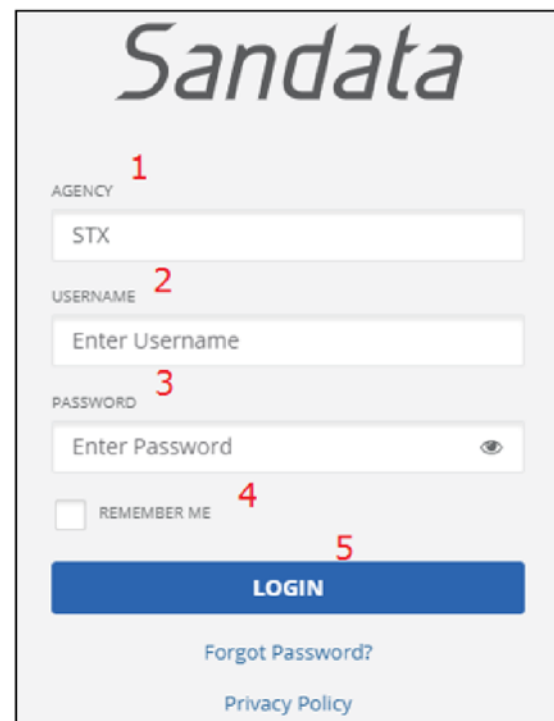
After completing your training, you will receive an email that will display your...

- Account = Agency
- A Temporary Password
- Click the **Login** button



These are the fields you will see on the login page.

1. **AGENCY**
This is the account STX number
Included in the temporary
Password email.
2. **USERNAME**
This is your email address
3. **PASSWORD**
This is the temporary password
If logging in for the first time, or
The password you created.
4. **REMEMBER ME**
Remembers login information
5. **LOGIN**



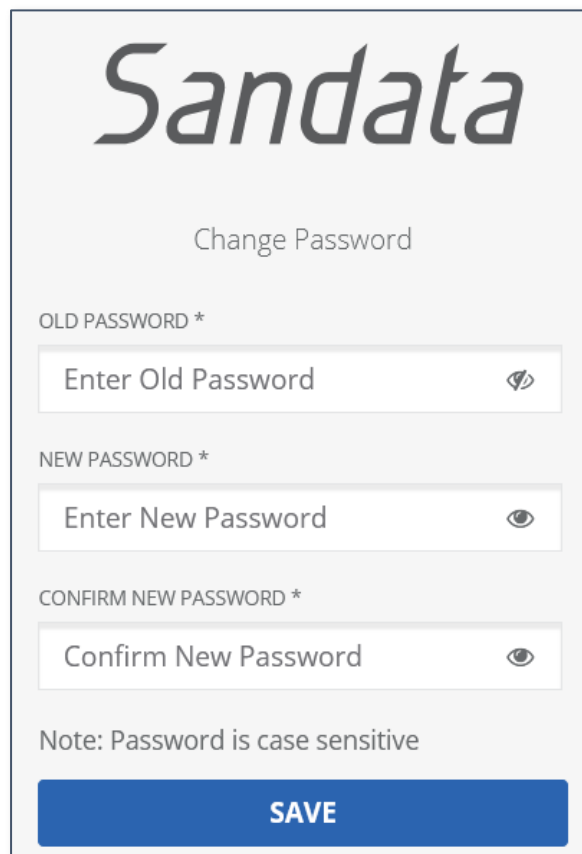
The screenshot shows the Sandata login page. It has the Sandata logo at the top. Below it are five numbered fields: 1. AGENCY (with a dropdown menu showing "STX"), 2. USERNAME (with a text input field "Enter Username"), 3. PASSWORD (with a text input field "Enter Password" and an eye icon), 4. REMEMBER ME (with a checkbox), and 5. LOGIN (with a blue button). Below the button are links for "Forgot Password?" and "Privacy Policy".

You will be asked to setup a new password.

Your password **MUST** have at least:

- 1 Uppercase letter
- 1 Lowercase letter
- 1 Number
- 1 Special character (!@#\$\$%^&*)
- Be at least 12 characters long

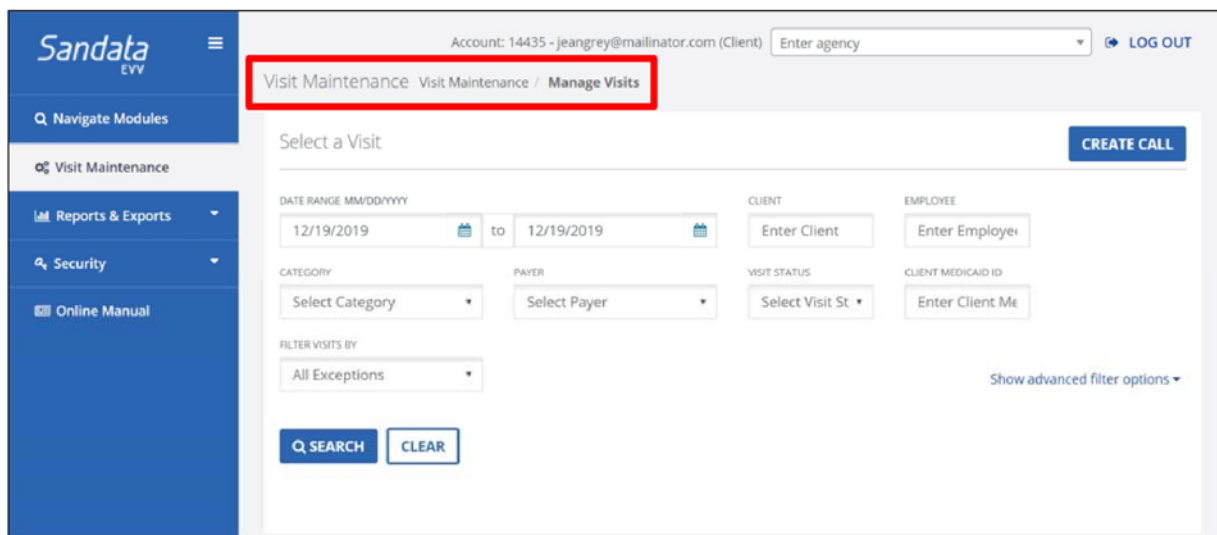
1. Enter the temporary password in the *OLD PASSWORD* field.
2. Enter the new password you create twice and then click **SAVE**.



The image shows a 'Change Password' form for Sandata. At the top is the Sandata logo. Below it is the title 'Change Password'. The form contains three input fields: 'OLD PASSWORD *', 'NEW PASSWORD *', and 'CONFIRM NEW PASSWORD *'. Each field has a placeholder text and a toggle icon (an eye with a slash) to show or hide the password. Below the fields is a note: 'Note: Password is case sensitive'. At the bottom is a blue button labeled 'SAVE'.

Visit Maintenance

After you log in, the Visit Maintenance page will display. The Visit Maintenance screen is where you can view visits by date and also exceptions for each visit. Your client must approve the hours that you worked and the services that you performed before you are paid.



The screenshot shows the Sandata EVV Visit Maintenance interface. The top navigation bar includes the Sandata EVV logo, a user account dropdown (Account: 14435 - jeangrey@mailinator.com (Client)), an agency search field, and a LOG OUT button. The breadcrumb trail is "Visit Maintenance / Visit Maintenance / Manage Visits", with "Manage Visits" highlighted in a red box. The main content area is titled "Select a Visit" and features a "CREATE CALL" button. Below the title are several filter fields: "DATE RANGE MM/DD/YYYY" (12/19/2019 to 12/19/2019), "CLIENT" (Enter Client), "EMPLOYEE" (Enter Employee), "CATEGORY" (Select Category), "PAYER" (Select Payer), "VISIT STATUS" (Select Visit St), and "CLIENT MEDICAID ID" (Enter Client Me). A "FILTER VISITS BY" dropdown is set to "All Exceptions", with a "Show advanced filter options" link. At the bottom are "SEARCH" and "CLEAR" buttons.

What are Exceptions

Exceptions occur when information is missing from a visit or could not be verified by the EVV system.

Example:

An employee might *forget* to **Start** a visit, **End** a visit, **Task(s)** might be missing, or the client's location could not be verified.

These are called **Exceptions** and the process to correct these exceptions are in the **Visit Maintenance** screen.

There are Two Types of Exceptions

- 1** Exceptions that *must* be Fixed
 - a** An exception that can only be fixed, must be done by a client or the fiscal.
- 2** Exceptions that *must* be Acknowledged
 - a** An exception that can only be acknowledged has a check box next to the exception on the right side of the screen. The check box is checked to indicate that the exception has be viewed and acknowledged to have the visit move to a verify state.

Exceptions are displayed when there is something wrong with a visit and cannot be verified.

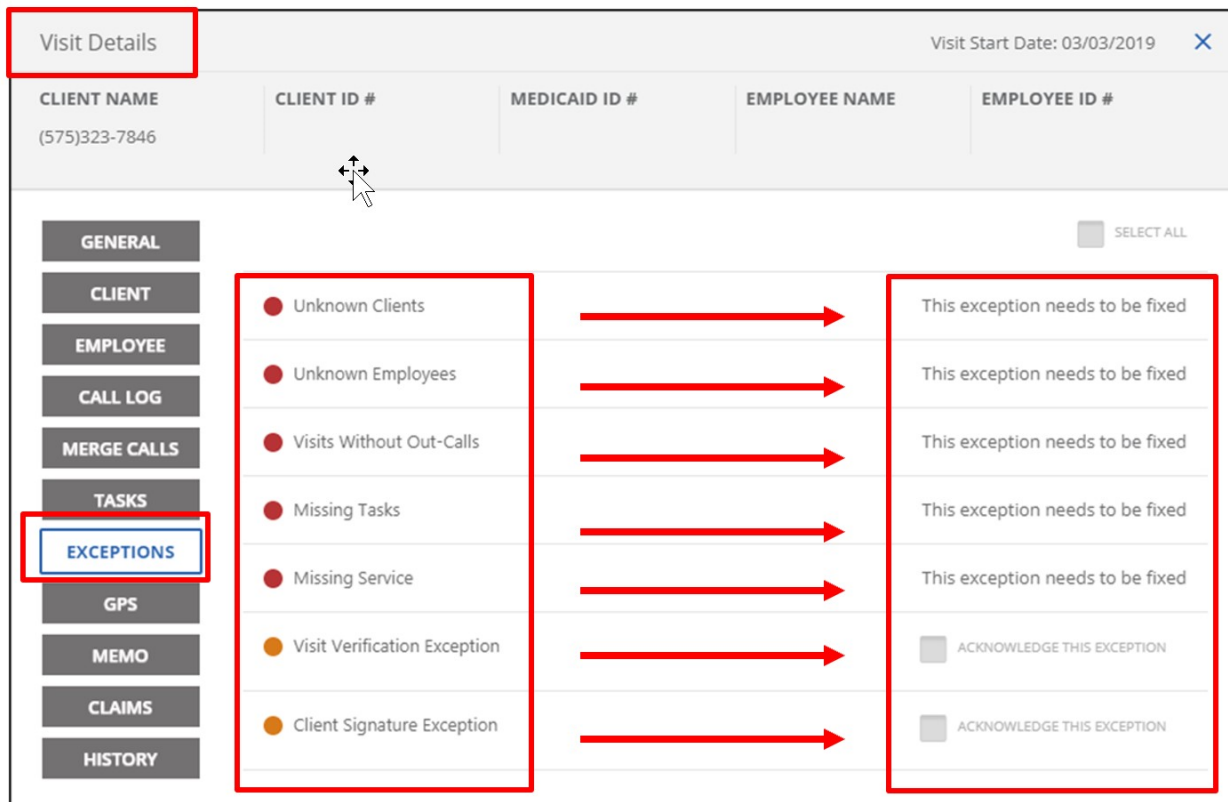
- All Exceptions must be either fixed or acknowledged by the employer in the Visit Maintenance screen in order for the status to change to **verified**.

Most Common Types of Exceptions

- **Client Signature** – The client’s electronic signature or voice recording is missing.
- **Service Verification** – The client did not verify the service at the end of the visit.
- **Missing Service** – Services provided during the visit are missing.
- **Missing Task** – The minimum number of tasks is missing.
- **Visit Verification** – The client has not verified the visit time at the end of a visit.
- **Visit without in-calls/out-calls** – The visit does not have a call-in and/or a call-out.

Exceptions Screen

The **Visit Detail** screen will list the exceptions for the visit and the options to resolve each exception. Double click on any visit to bring up the **Visit Detail** screen, then click the **Exceptions** tab.



The screenshot shows the 'Visit Details' screen for a visit starting on 03/03/2019. The client name is (575)323-7846. The 'EXCEPTIONS' tab is selected in the left sidebar. The main area displays a list of exceptions:

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
(575)323-7846				

Exception Type	Action
Unknown Clients	This exception needs to be fixed
Unknown Employees	This exception needs to be fixed
Visits Without Out-Calls	This exception needs to be fixed
Missing Tasks	This exception needs to be fixed
Missing Service	This exception needs to be fixed
Visit Verification Exception	<input type="checkbox"/> ACKNOWLEDGE THIS EXCEPTION
Client Signature Exception	<input type="checkbox"/> ACKNOWLEDGE THIS EXCEPTION

You can **ONLY VIEW** exceptions. You will not be able to fix or acknowledge them. Only the client can fix or acknowledge exceptions.

The General Tab

Displays the start and end time, status, service, among other details for the selected visit.

Visit Details
Visit Start Date: 02/05/2019 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

- GENERAL**
- CLIENT
- EMPLOYEE
- CALL LOG
- MERGE CALLS
- TASKS
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

VISIT START DATE	VISIT END DATE	VISIT TIME ZONE	VISIT STATUS
None	02/05/2019	America/New_York	Incomplete
CALL IN	CALL OUT	CALL HOURS	
None	08:56 AM	None	
ADJUSTED IN DATE	ADJUSTED IN HH:MM AM/PM	ADJUSTED OUT DATE	ADJUSTED OUT HH:MM AM/PM
MM/DD/YYYY		02/05/2019	08:56 AM
AGENCY ID	AGENCY NAME	BILL HOURS	PAY HOURS
14425	UAT CT DSS		
PAYER	PROGRAM	SERVICE	
CTDSS	CTCDS	NURSE TRAINING ▾	
CLIENT VERIFIED TIME	CLIENT VERIFIED SERVICE	CLIENT SIGNATURE	
Yes	Yes	Yes	
VISIT SOURCE			
CT DSS CDS			
<input type="checkbox"/> DO NOT BILL		<input checked="" type="checkbox"/> APPROVED	

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Updating Visit Information

If you need to update the Adjusted-In Date, Adjusted-In Time, Adjusted Out Date, and Adjusted Out Time.

Visit Details
Visit Start Date: 02/05/2019 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

TASKS

VISIT START DATE

VISIT END DATE

VISIT TIME ZONE

VISIT STATUS

CALL IN

CALL OUT

CALL HOURS

ADJUSTED IN DATE

ADJUSTED IN HH:MM AM/PM

ADJUSTED OUT DATE

ADJUSTED OUT HH:MM AM/PM

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The Client Tab

Displays details about your client's ADDRESS, PHONE NUMBER, and LANGUAGE PREFERENCE.

Visit Details
Visit Start Date: 02/05/2019 ✕

CLIENT NAME Grayson, Pete	CLIENT ID # 32546	MEDICAID ID # 900123987453	EMPLOYEE NAME Garner, Pam	EMPLOYEE ID # 89776
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GENERAL

CLIENT

EMPLOYEE

CALL LOG

MERGE CALLS

TASKS

EXCEPTIONS

GPS

MEMO

CLAIMS

HISTORY

Client Contact Information

ADDRESS TYPE Home	ADDRESS LINE 1 7708 San Felipe	ADDRESS LINE 2 None	CITY Austin
STATE TX	ZIP CODE 78729-0000		
PHONE NUMBER (516) 484-4400			
EMAIL ADDRESS heyblabalot@gmail.com	GENDER Male	LANGUAGE PREFERENCE English	SUPERVISOR None
TIME ZONE US/Eastern			

Emergency Contact Information

Find Client

LAST NAME <input type="text" value="Enter Last Name"/>	FIRST NAME <input type="text" value="Enter First Name"/>	CLIENT ID # <input type="text" value="Enter Client ID #"/>	<input type="button" value="Q"/>
CLIENT MEDICAID ID <input type="text" value="Enter Client Medicaid ID"/>	<input type="checkbox"/> INCLUDE INACTIVE CLIENTS		

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The Employee Tab

Displays details about you such as: **EMPLOYEE EMAIL, SANTRAX ID, ADDRESS, and PHONE NUMBER.**

Visit Details
Visit Start Date: 02/05/2019 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

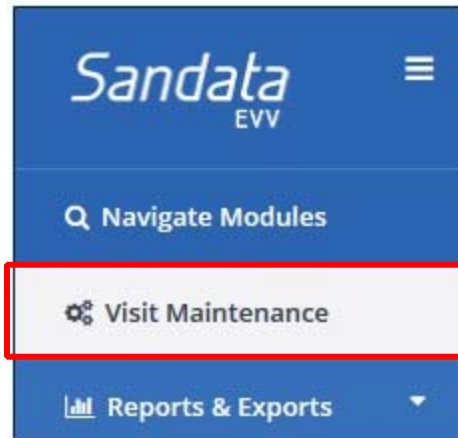
- GENERAL
- CLIENT
- EMPLOYEE
- CALL LOG
- MERGE CALLS
- TASKS
- EXCEPTIONS
- GPS
- MEMO
- CLAIMS
- HISTORY

SANTRAX ID 89776	PRIMARY PHONE NUMBER None	DISCIPLINE None	
ADDRESS LINE 1 None	ADDRESS LINE 2 None	CITY None	STATE None
ZIP CODE None	TERMINATION DATE None		
PROVIDER ID 9521453			

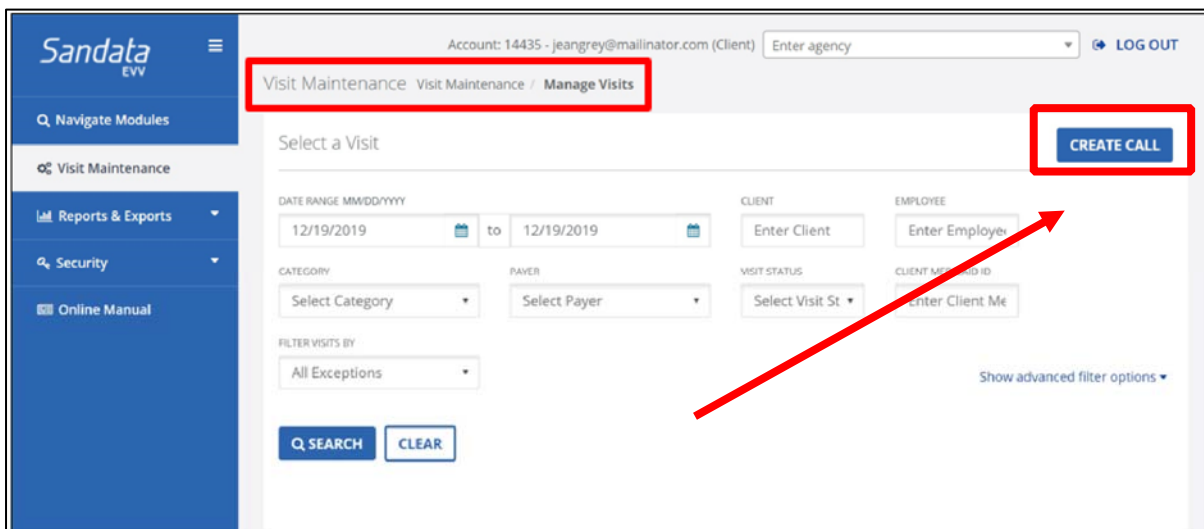
15

How to Add a Visit (CREATE CALL)

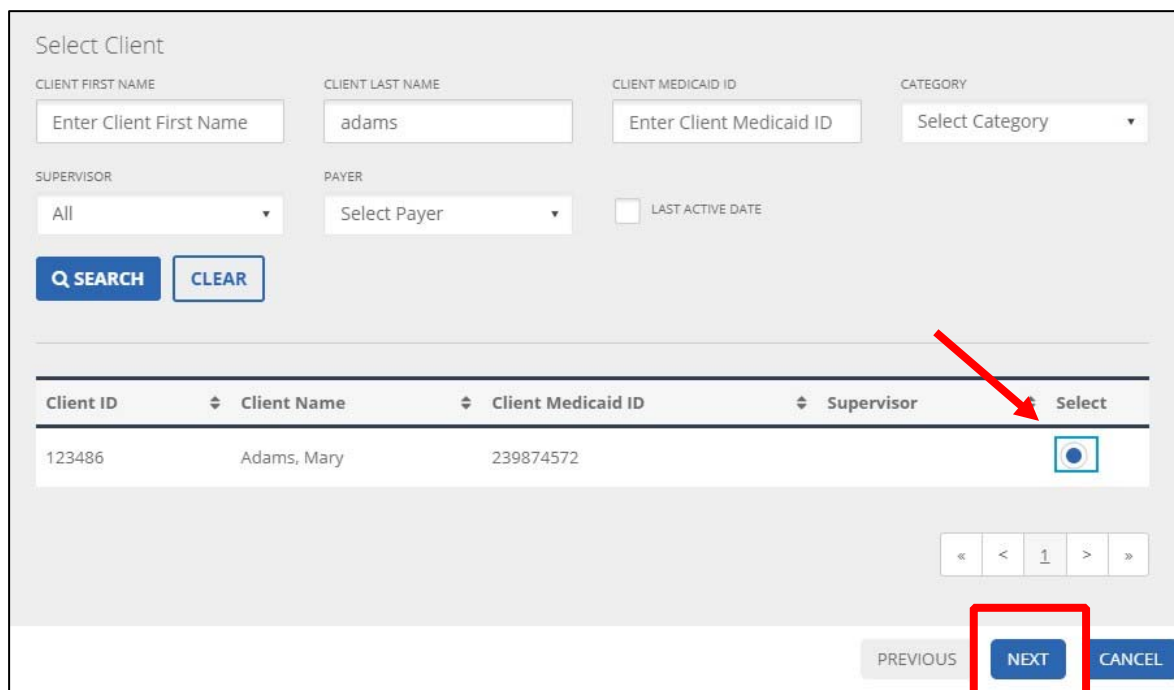
From the EVV website menu, click **Visit Maintenance**.



Click **CREATE CALL** on the right.



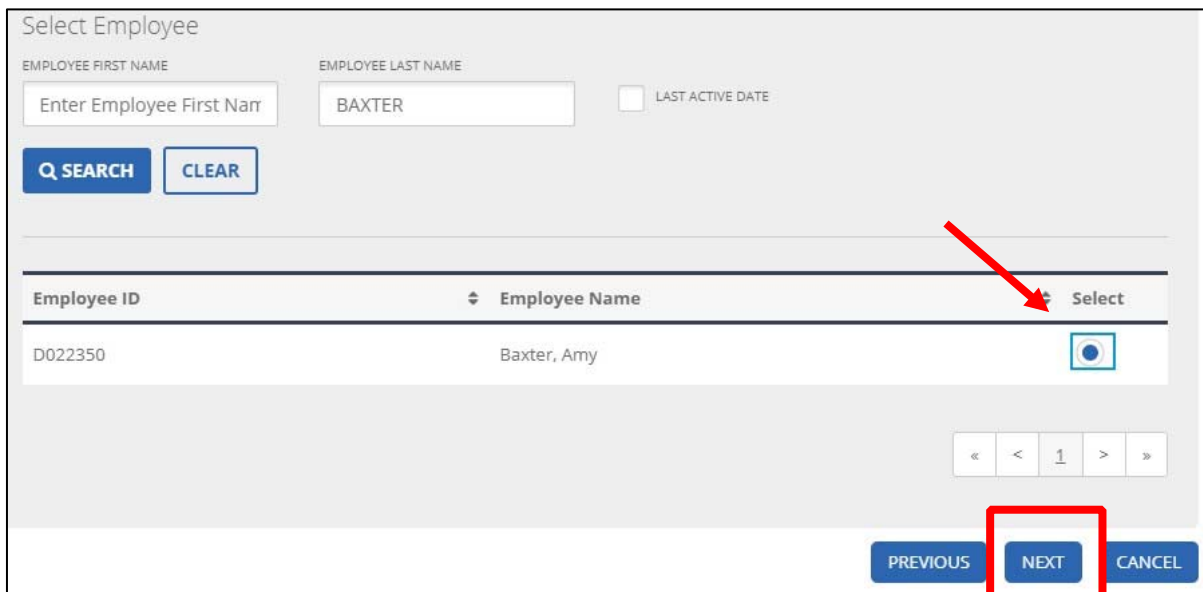
- Enter the client's first and last name, click **SEARCH** to list your client.
- Select the client in the list by clicking on the **Select** circle on the right side of the page.
- Click **NEXT**.



Client ID	Client Name	Client Medicaid ID	Supervisor	Select
123486	Adams, Mary	239874572		<input type="radio"/>

- Enter your last name, click **SEARCH**.
- Select your name from the list by clicking on the **Select** circle on the right side of the page.

- Click **NEXT**.



Select Employee

EMPLOYEE FIRST NAME: Enter Employee First Name

EMPLOYEE LAST NAME: BAXTER

LAST ACTIVE DATE

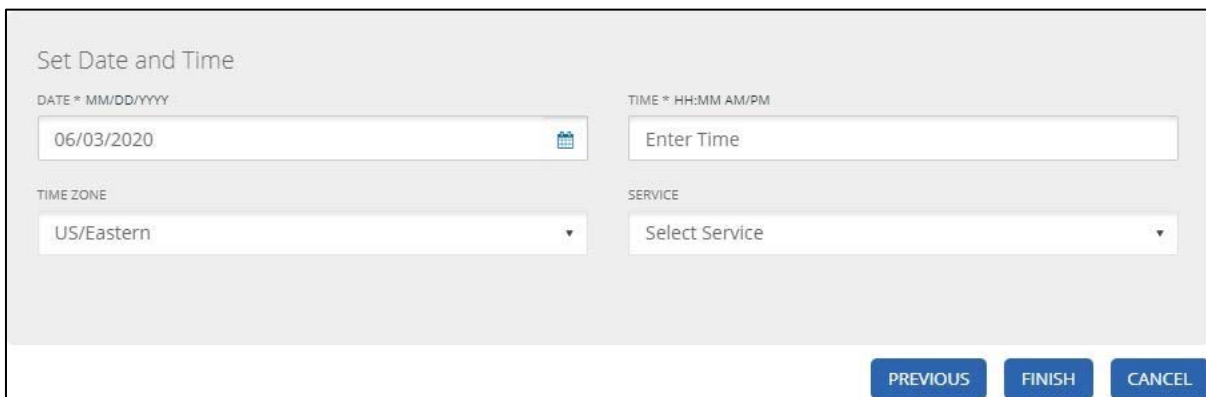
Q SEARCH CLEAR

Employee ID	Employee Name	Select
D022350	Baxter, Amy	<input type="checkbox"/>

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PREVIOUS **NEXT** CANCEL

- Select the **DATE**, **TIME** and **SERVICES**.
- Click **FINISH**.



Set Date and Time

DATE * MM/DD/YYYY: 06/03/2020

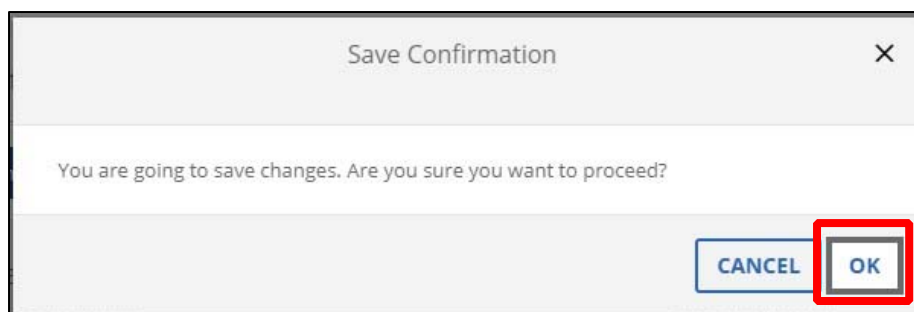
TIME * HH:MM AM/PM: Enter Time

TIME ZONE: US/Eastern

SERVICE: Select Service

PREVIOUS FINISH CANCEL

- The **Save Confirmation** dialog box displays.
- Click **OK**.



Save Confirmation

You are going to save changes. Are you sure you want to proceed?

CANCEL **OK**

Your **ADDED** visit will now appear; however, it will ONLY show the call-in time you entered. This will display as an exception and will need to be fixed in order for this visit to be verified.

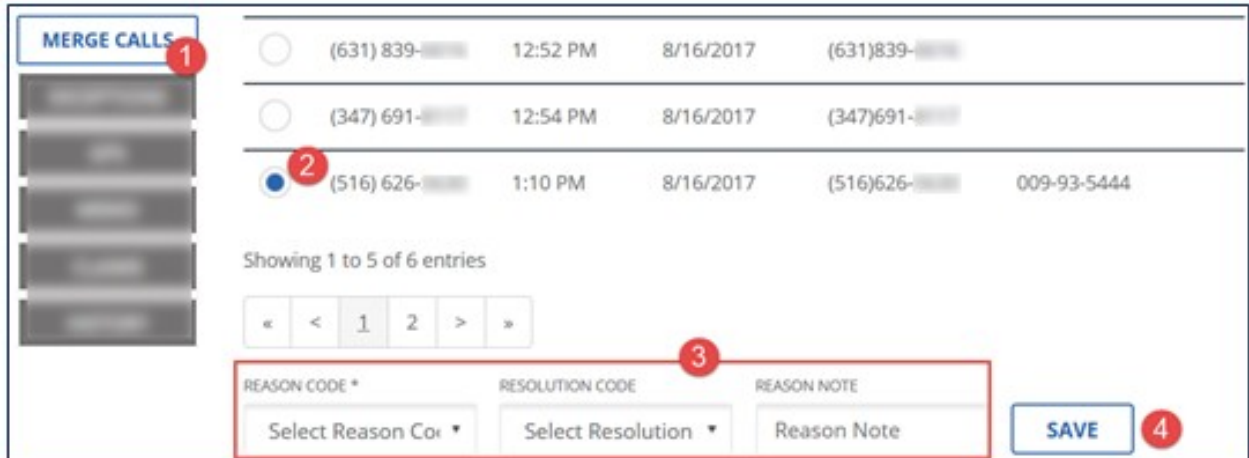
Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	F H
Adams, Mary	Baxter, Amy	Flexible Choices	06/03/2020	09:00 AM	<input checked="" type="radio"/>		09:00 AM			

Merging Calls

Displays a list of calls that may be merged with a visit if the visit is missing a call time. Calls can be merged if start/end times are close and they are not associated with another visit.

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**, **RESOLUTION CODE** and **REASON NOTE**, if needed.

4. Click **SAVE**.



Selection	Phone Number	Time	Date	Phone Number	Phone Number
<input type="radio"/>	(631) 839-XXXX	12:52 PM	8/16/2017	(631)839-XXXX	
<input type="radio"/>	(347) 691-XXXX	12:54 PM	8/16/2017	(347)691-XXXX	
<input checked="" type="radio"/>	(516) 626-XXXX	1:10 PM	8/16/2017	(516)626-XXXX	009-93-5444

Showing 1 to 5 of 6 entries

« < 1 2 > »

REASON CODE * RESOLUTION CODE REASON NOTE

Select Reason Cor ▾ Select Resolution ▾ Reason Note

SAVE

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, you can go back to the *Call Log* to manually add a call time.

Client Name	Employee Name	Service	Visit Date	Call In	Call Out
Moss, Donna	Young, Charlie	OHCW PCA (T1019)	04/04/2019		06:00 AM
Moss,	Young, Charlie		04/03/2019		11:23

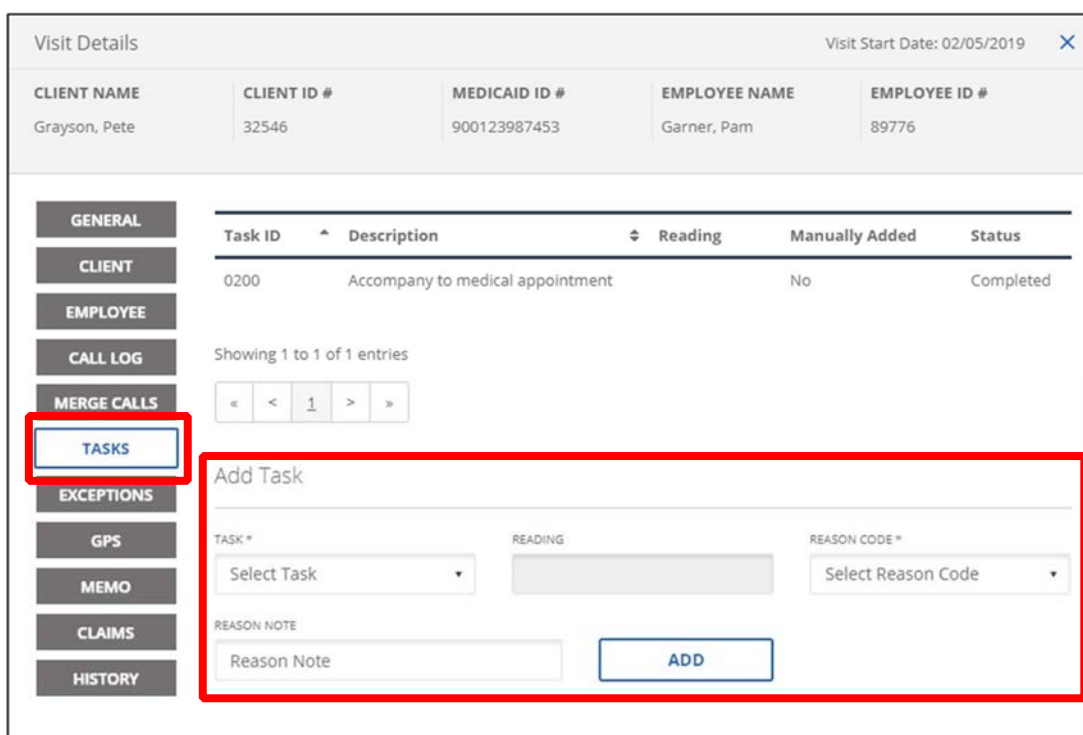
Exceptions:
Visits Without In-Calls

TASKS

Tasks are services performed by the employee during the visit. They are entered into the system by the employee after the visit. A person with the appropriate permissions can add additional tasks to the visit or delete existing tasks.

Adding a TASK

- In the **Visit Detail** screen, click **TASKS** on the left of the page.
- In the Add Task section, select which **TASK** you would like to add from the drop-down box.



Visit Details Visit Start Date: 02/05/2019 X

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

GENERAL

Task ID	Description	Reading	Manually Added	Status
0200	Accompany to medical appointment		No	Completed

Showing 1 to 1 of 1 entries

TASKS

Add Task

TASK* READING REASON CODE*

REASON NOTE

- Select a **REASON CODE**.
- You may enter a **REASON NOTE** if you would like, however, it is not a required field.
- Click **ADD**.

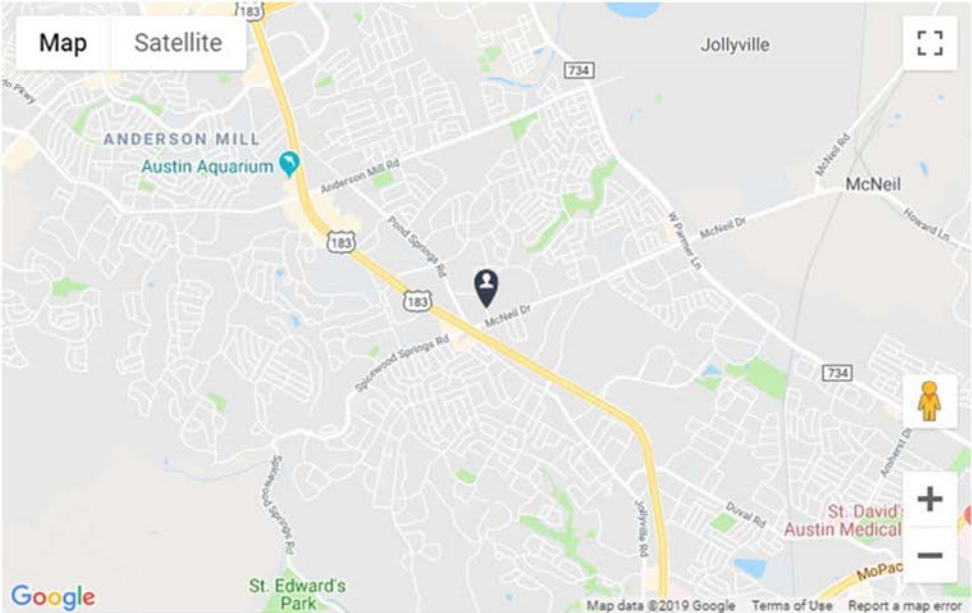
The GPS Tab

Displays the location of the mobile app start and end times and your service address.

Visit Details
Visit Start Date: 02/05/2019 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

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



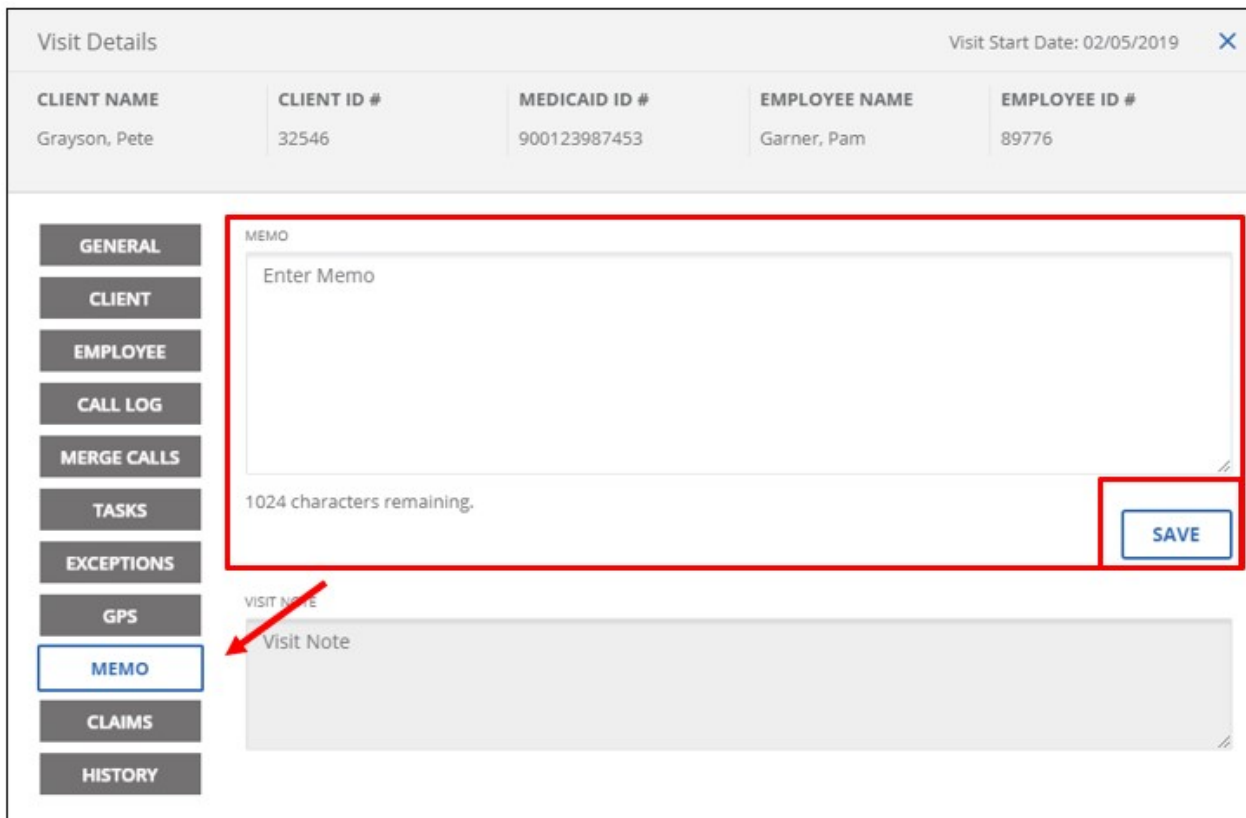
Client
 No GPS Exception
 GPS Exception

The MEMO Tab

You may enter notes about the visit. The **Visit Note** screen displays the notes entered in the mobile app at the end of the visit.

To Add a MEMO

Type the visit note and click **SAVE**.




The screenshot shows the "Visit Details" screen with the following information:

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

Visit Start Date: 02/05/2019

The left sidebar contains the following tabs: GENERAL, CLIENT, EMPLOYEE, CALL LOG, MERGE CALLS, TASKS, EXCEPTIONS, GPS, **MEMO** (highlighted), CLAIMS, HISTORY.

The MEMO tab is active, showing a text input field with the placeholder "Enter Memo" and a "SAVE" button. A red box highlights the input field and the "SAVE" button. Below the input field, it says "1024 characters remaining." A red arrow points to the "MEMO" tab in the sidebar.

 The visit note should **NOT** be used to satisfy documentation requirements.

The History Tab

Displays visit history and any change made to the visit. The most recent changes appear at the top of the screen.

Visit Details
Visit Start Date: 02/05/2019 ✕

CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #
Grayson, Pete	32546	900123987453	Garner, Pam	89776

GENERAL

CLIENT

EMPLOYEE

CALL LOG

TASKS

EXCEPTIONS

GPS

MEMO


CLAIMS

HISTORY

REASON CODE	ITEM	DATE	CHANGED BY
09 - Phone in Use by Patient/Family	Manual Call - Add to Specified Visit	3/28/2019 3:54:26 PM	PGIBSON@SANDATA.COM

Showing 1 to 1 of 1 entries

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>
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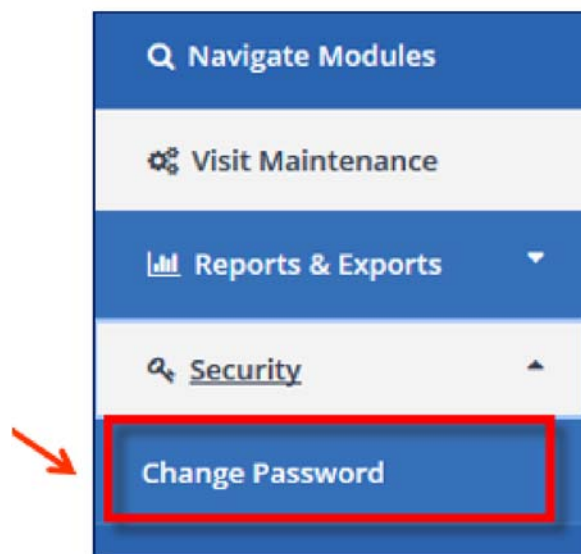


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Security/Changing Your Password

You can change your password at any time.

- Click **Security** on the left of the page then, select **Change Password**.



Your EVV password **MUST** have at least:

- 1 Uppercase letter
- 1 Lowercase letter
- 1 Number
- 1 Special character (! @#\$%^&*)
- Be at least 12 characters long

Enter your **Old Password**

Enter a **New Password**

Enter the **New Password** (*again*)

Click **SAVE**



The image shows a 'Change Password' form for Sandata. At the top is the Sandata logo and the title 'Change Password'. Below the title are three input fields, each with a red arrow pointing to it from the left. The first field is labeled 'OLD PASSWORD *' and contains the text 'Enter Old Password'. The second field is labeled 'NEW PASSWORD *' and contains the text 'Enter New Password'. The third field is labeled 'CONFIRM NEW PASSWORD *' and contains the text 'Confirm New Password'. Below the input fields is a note: 'Note: Password is case sensitive'. At the bottom of the form is a blue button labeled 'SAVE' with a red arrow pointing to it from the left.

Contact Information:

Questions regarding the Sandata EVV system? Contact: (833) 656-1021