



# Visit Maintenance

EVV Portal Guide for Employers and  
Employers of Record

Need more help? Contact:

DDS EVV Support  
Center (833) 656-  
1021

# Table of Contents



<b>What is visit confirmation?</b> .....	2
<b>How do I confirm a visit using the mobile app?</b> .....	3
<b>How do I confirm a visit using a telephone?</b> .....	3
<b>What is Visit Maintenance?</b> .....	4
<b>My employee forgot to call-in or call-out. What should I do?</b> .....	5
<b>I need to add a visit. What should I do?</b> .....	10
<b>How do I add a task?</b> .....	11
<b>My employee forgot to add a visit note. What should I do?</b> .....	12
<b>What can I find on the other tabs?</b> .....	13
<b>How do I change my password?</b> .....	19

## What is visit confirmation?



Your employee will either use a telephone or the mobile app to log visit start and end times, and the services provided during each visit. Your employee may also be required to enter at least one task performed during each visit. Check with your State's program.

You may have the option of using a Fixed Visit Verification device if your employee(s) can neither use a telephone nor the mobile app. Check with your State's program.

At the end of each visit, your employee will pass the phone or mobile device to you to confirm the details of the visit. If your employee is using the mobile app, you will be able to either provide an electronic signature by signing on the device or by recording your voice. You may not be required to provide an electronic signature. Check with your State's program.

## How do I confirm a visit using the mobile app?



Once your employee enters the information to complete the visit, your employee will pass the mobile device to you to confirm the visit. The **Client Verify** screen will display. You will verify the visit from this screen. Refer to the **Mobile App Guide** for more details about how to use the mobile app.

## How do I confirm a visit using a telephone?

Once your employee enters the information to complete the visit, your employee will hand the telephone to you to confirm the visit. You will record a voice confirmation for the visit. Refer to the **Telephone Visit Verification (TVV) Toolkit** for more details about how to use TVV.

# What is Visit Maintenance?



Sometimes there might be information that is missing from a visit or could not be verified by the EVV system. For example, Mary might forget to check-in or check-out, a service or task might be missing, or the location could not be verified. These are called Exceptions and the process to handle these exceptions is called Visit Maintenance.

A visit goes through statuses as visit details are recorded and updated.



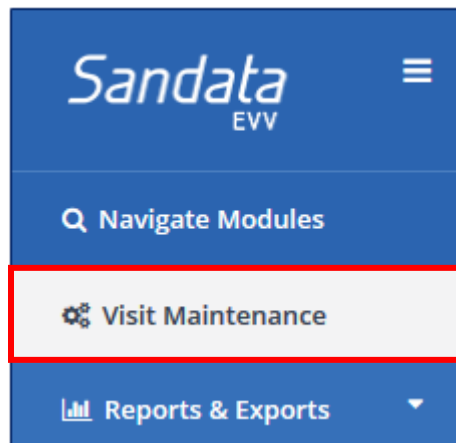
<p>The visit is in process.</p>	<p>The visit has taken place but there are exceptions such as missing data. You must verify additional information.</p>	<p>There are no exceptions for the visit and you must approve the visit.</p>	<p>You have approved the visit. The visit is ready for payroll processing.</p>	<p>The visit has been processed for payroll.</p>
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# My employee forgot to call-in or call-out. What should I do?



If your employee forgot to call-in at the start of a visit, call-out at the end of a visit, or mark the tasks performed during the visit, you may update the visit yourself.

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



The Manage Visits screen displays.

Select a Visit [CREATE CALL](#)

---

DATE RANGE MM/DD/YYYY  to  CLIENT  EMPLOYEE

CATEGORY  PAYER  VISIT STATUS  CLIENT MEDICAID ID

FILTER VISITS BY  [Show advanced filter options](#)

Click the calendar icon to change the start date and end date to find a visit. Then click **SEARCH**.



Select a Visit **CREATE CALL**

---

DATE RANGE MM/DD/YYYY: 02/04/2019 to 03/31/2019

CLIENT: Enter Client EMPLOYEE: Enter Employee

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

FILTER VISITS BY: All Exceptions Show advanced filter options ▾

**Q SEARCH**

CLEAR

FEBRUARY 2019

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

If your employee worked during the start date and end date, a list of visits will be displayed.


Show: 50 per page Show Display Options ▾

« < 1 > » Show Legend Showing 1 to 3 of 3 entries


Client Name	Employee Name	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Pay Hours	Bill Hours	Visit Status	Do Not Bill	Appr
Grayson, Pete	Garner, Pam	PCA OVER-CFC/CHC	02/11/2019	●	10:08 AM					[...]	[...]	Incomplete	<input type="checkbox"/>	
Grayson, Pete	Garner, Pam	NURSE TRAINING-CFC	02/05/2019	●	10:46 AM	03:53 PM	05:07			05:00	05:07	Incomplete	<input type="checkbox"/>	
Grayson, Pete	Garner, Pam	NURSE TRAINING-CFC	02/05/2019	●	08:56 AM					[...]	[...]	Incomplete	<input type="checkbox"/>	




Showing 1 to 3 of 3 entries

APPROVE ALL
DISAPPROVE ALL

Click either the visit or the Edit icon  all the way to the right to view the details of the visit.




You might need to use the scroll bar at the bottom of the page to move to the right to see the Edit icon .

Employee	Service	Visit Date	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Pay Hours	Bill Hours	Visit Status	Do Not Bill	Approved	Actions
; Pam	PCA OVER-CFC/CHC	02/11/2019	●	10:08 AM					[ ... ]	[ ... ]	Incomplete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
; Pam	NURSE TRAINING-CFC	02/05/2019	10:46 AM	03:53 PM	05:07				05:00	05:07	Incomplete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
; Pam	NURSE TRAINING-CFC	02/05/2019	●	08:56 AM					[ ... ]	[ ... ]	Incomplete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	



The Visit Details screen displays details about you and your employee such as CLIENT NAME, CLIENT ID, MEDICAID ID, EMPLOYEE NAME, and EMPLOYEE ID for the visit. Use the tabs on the left to view additional details about the 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:** Displays the start and end time, status, service, among other details for the selected visit.

Visit Details				Visit Start Date: 02/05/2019	X
<b>CLIENT NAME</b>	<b>CLIENT ID #</b>	<b>MEDICAID ID #</b>	<b>EMPLOYEE NAME</b>	<b>EMPLOYEE ID #</b>	
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		



If you need to update the call-in or call-out time, type the Adjusted In Date, Adjusted In Time, Adjusted Out Date, Adjusted Out Time, or Service on the General screen and click Save.

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	None	VISIT END DATE	02/05/2019	VISIT TIME ZONE	America/New_York	VISIT STATUS	Incomplete
CALL IN	None	CALL OUT	08:56 AM	CALL HOURS	None		
ADJUSTED IN DATE	MM/DD/YYYY	ADJUSTED IN HH:MM AM/PM		ADJUSTED OUT DATE	02/05/2019	ADJUSTED OUT HH:MM AM/PM	08:56 AM

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Page 9

# I need to add a visit. What should I do?



If your employee forgot to record a visit, you will need to add a visit on the Call Log screen. Enter the call-in time, enter the call-out time, select the Service, and select the Reason for adding the visit. Click Add.

**CALL LOG:** Displays the details of the call-in/call-out times and the type of call (TVV, MVV, or Manual Call.)

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
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INTERIM				CLIENT ID# 32546
CALL DATE	CALL TIME	CALL TYPE	SERVICE	
02/05/2019	08:55 AM	MVV (Mobile, GPS)	NURSE TRAINING-CFC	
USER	LATITUDE	LONGITUDE	CALL SOURCE	
Pgarnersandata@gma...	41.76795377430879	-72.68775766285334	CT DSS CDS	

CALL OUT				CLIENT ID# 32546
CALL DATE	CALL TIME	CALL TYPE	SERVICE	
02/05/2019	08:56 AM	MVV (Mobile, GPS)	NURSE TRAINING-CFC	
USER	LATITUDE	LONGITUDE	CALL SOURCE	
Pgarnersandata@gma...	41.76792057636086	-72.68770659307633	CT DSS CDS	

### Add Manual Call

CALL DATE \* MM/DD/YYYY:

CALL TIME \* HH:MM AM/PM:

SERVICE:

REASON CODE \*:

REASON NOTE:

# How do I add a task?



If your employee forgot to add a task, you may add a task from the Tasks screen.

**TASKS:** Displays the tasks performed for the visit. The Status column displays 'Completed' if a task was completed or 'Refused' if you declined a task.

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
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- CLAIMS
- HISTORY

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

Showing 1 to 1 of 1 entries

« < 1 > »

Add Task

TASK \*      READING      REASON CODE \*

Select Task            Select Reason Code

REASON NOTE

Reason Note

# My employee forgot to add a visit note. What should I do?



**MEMO:** Your employee may enter notes about the visit. The **Visit Note** screen displays the notes entered in the mobile app at the end of the visit. Type the visit note and click **SAVE**.

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

MEMO

Enter Memo

1024 characters remaining.

SAVE

VISIT NOTE

Visit Note



The visit note should not be used to satisfy documentation requirements.

# What can I find on the other tabs?



**CLIENT:** Displays details about your ADDRESS, PHONE NUMBER, and LANGUAGE PREFERENCE.

Visit Details		Visit Start Date: 02/05/2019 <span>✕</span>		
<b>CLIENT NAME</b>	<b>CLIENT ID #</b>	<b>MEDICAID ID #</b>	<b>EMPLOYEE NAME</b>	<b>EMPLOYEE ID #</b>
Grayson, Pete	32546	900123987453	Garner, Pam	89776

- GENERAL
- CLIENT**
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## Client Contact Information

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

## Emergency Contact Information

### Find Client

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

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

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	

<b>GENERAL</b>	SANTRAX ID 89776	PRIMARY PHONE NUMBER None	DISCIPLINE None	
<b>CLIENT</b>	ADDRESS LINE 1 None	ADDRESS LINE 2 None	CITY None	STATE None
<b>EMPLOYEE</b>	ZIP CODE None	TERMINATION DATE None		
<b>CALL LOG</b>	PROVIDER ID 9521453			
<b>MERGE CALLS</b>				
<b>TASKS</b>				
<b>EXCEPTIONS</b>				
<b>GPS</b>				
<b>MEMO</b>				
<b>CLAIMS</b>				
<b>HISTORY</b>				



If you need to update your mailing address, phone number, or email address, contact your Fiscal Intermediary.

**MERGE 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.

Visit Details					Visit Start Date: 02/20/2019 <span style="float: right;">✕</span>
CLIENT NAME	CLIENT ID #	MEDICAID ID #	EMPLOYEE NAME	EMPLOYEE ID #	
(330)666-2022					

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

Below is a list of all calls that are close to the scheduled time.

	PHONE #	CALL TIME	CALL DATE	CLIENT NAME	EMPLOYEE NAME
<input type="radio"/>	(330) 666-2022	11:37 AM	2/20/2019	(330)666-2022	
<input type="radio"/>	(330) 666-2022	11:38 AM	2/20/2019	(330)666-2022	

Showing 1 to 2 of 2 entries

«	<	1	>	»
---	---	---	---	---



**EXCEPTIONS:** Displays the exceptions for the visit and the options to resolve each exception.


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

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

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

SELECT ALL

<span style="color: red;">●</span> Unknown Clients		This exception needs to be fixed
<span style="color: red;">●</span> Unknown Employees		This exception needs to be fixed
<span style="color: red;">●</span> Visits Without Out-Calls		This exception needs to be fixed
<span style="color: red;">●</span> Missing Tasks		This exception needs to be fixed
<span style="color: red;">●</span> Missing Service		This exception needs to be fixed
<span style="color: orange;">●</span> Visit Verification Exception		<input type="checkbox"/> ACKNOWLEDGE THIS EXCEPTION
<span style="color: orange;">●</span> Client Signature Exception		<input type="checkbox"/> ACKNOWLEDGE THIS EXCEPTION



Only you or your employer of record can acknowledge visit exceptions.

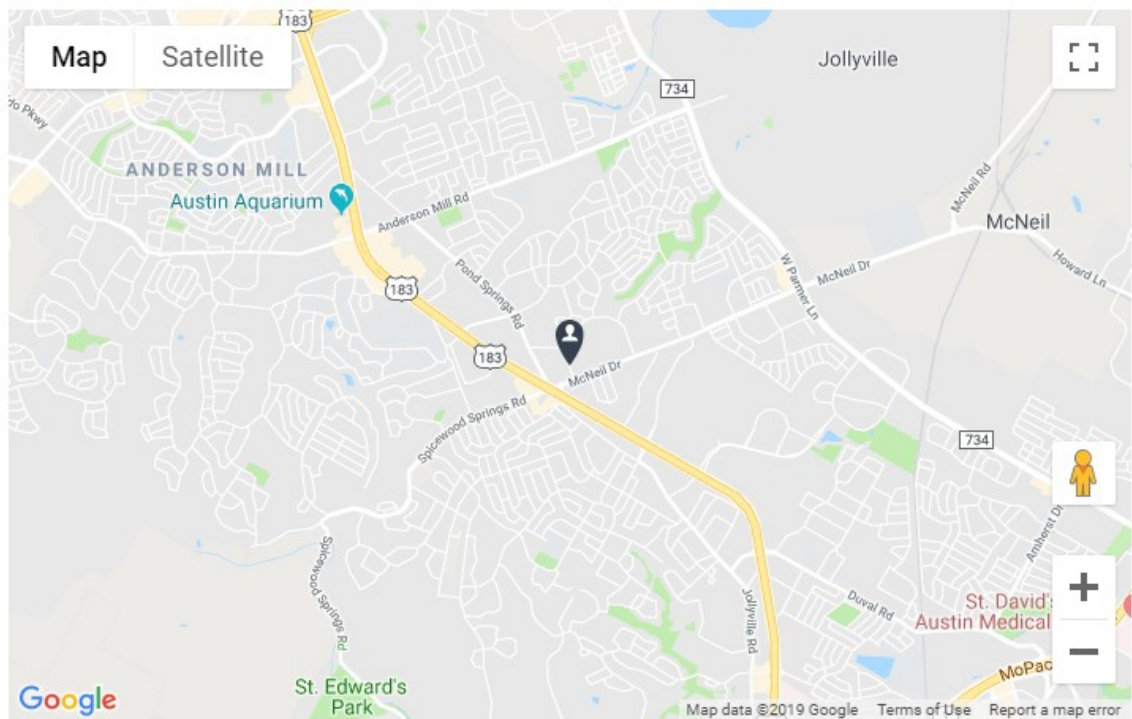
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Page 16

**GPS:** Displays the location of the SMC app start and end times and your service address.

Visit Details				Visit Start Date: 02/05/2019 <span>✕</span>	
<b>CLIENT NAME</b>	<b>CLIENT ID #</b>	<b>MEDICAID ID #</b>	<b>EMPLOYEE NAME</b>	<b>EMPLOYEE ID #</b>	
Grayson, Pete	32546	900123987453	Garner, Pam	89776	

- GENERAL
- CLIENT
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- EXCEPTIONS
- GPS
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- CLAIMS
- HISTORY



-  Client
-  No GPS Exception
-  GPS Exception

**HISTORY:** 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	X
<b>CLIENT NAME</b>	<b>CLIENT ID #</b>	<b>MEDICAID ID #</b>	<b>EMPLOYEE NAME</b>	<b>EMPLOYEE ID #</b>	
Grayson, Pete	32546	900123987453	Garner, Pam	89776	

- GENERAL
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- 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

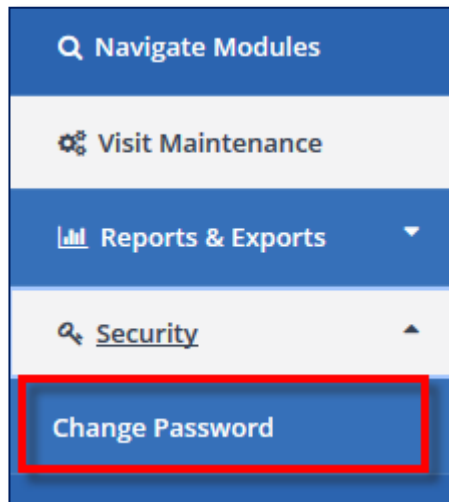
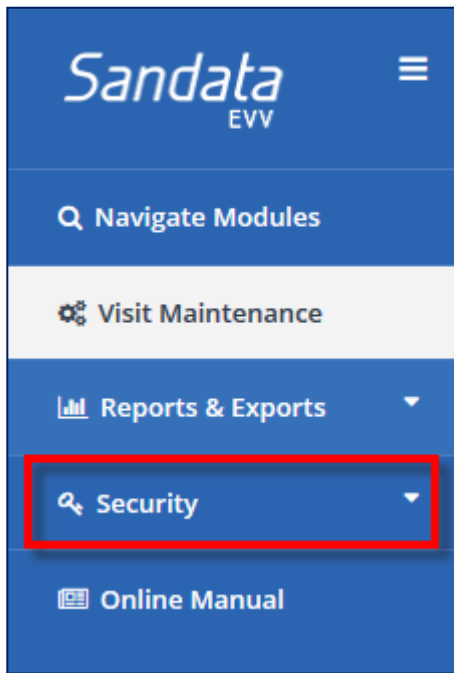
Showing 1 to 1 of 1 entries

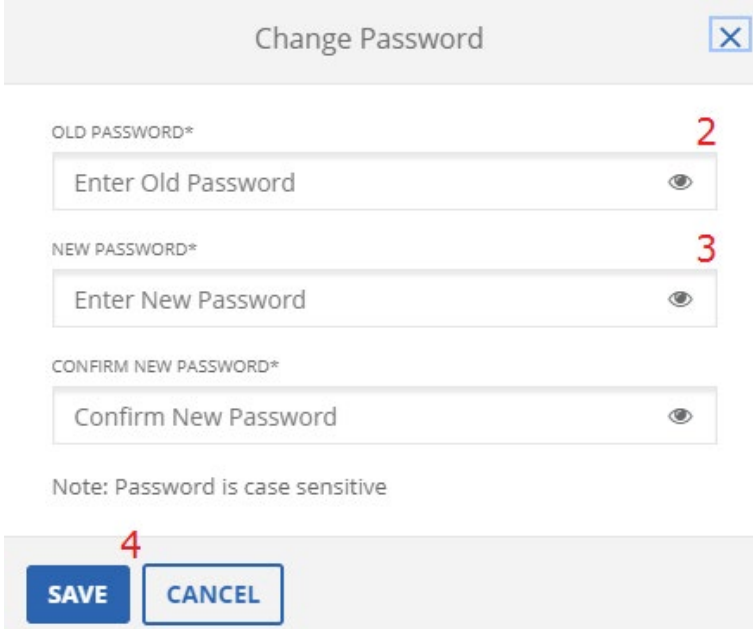
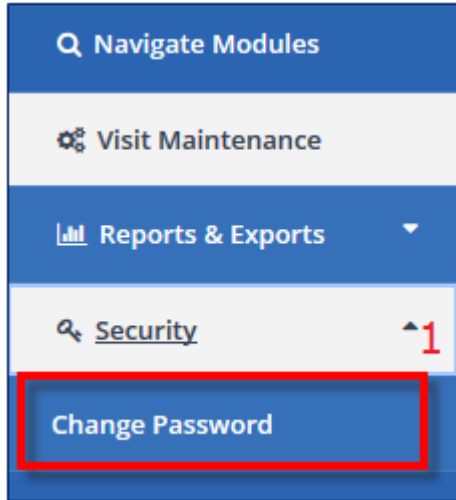
«	<	<u>1</u>	>	»
---	---	----------	---	---

# How do I change my password?



You may change your password for the EVV Portal. From the EVV Portal menu, click **Security**. The Security menu expands and displays the Change Password option.





A 'Change Password' form with a title bar and a close button. It contains three input fields: 'OLD PASSWORD\*' (labeled with a red '2'), 'NEW PASSWORD\*' (labeled with a red '3'), and 'CONFIRM NEW PASSWORD\*'. Each field has a text input area and a toggle eye icon. Below the fields is a note: 'Note: Password is case sensitive'. At the bottom, there are two buttons: 'SAVE' (labeled with a red '4') and 'CANCEL'.

1. Click **Change Password**.
2. Enter your current password in the **Enter Old Password** field.
3. Enter your new password in the **Enter New Password** field.
4. Type your new password again in the **Confirm New Password** field.
5. Click **SAVE**.