System User Training Guide

Ohio Department of Medicaid
Electronic Visit Verification Program

July 2024

v 2.0

Table of Contents

1. Program Overview

Module Objectives

- Describe the 21st Century Cures Act.
- Describe Ohio Department of Medicaid's (ODM) program objectives.

Introduction

Congress established a January 1, 2021, requirement for all states to use an Electronic Visit Verification (EVV) system, in accordance with the 21st Century Cures Act.

EVV is an electronic system that verifies when visits occur and documents the precise time services begin and end. The Ohio Department of Medicaid (ODM) will provide the Sandata EVV system free of charge for all providers, to meet the following objectives.

- Promote quality outcomes for Medicaid members.
- Ensure the health and welfare of Medicaid members choosing to receive long-term services and support where they live, or otherwise receive care in the community.
- Reduce billing errors and contain costs.
- Use technology to match data on claims with data in service documentation to report and verify details such as time and duration of visit.

Please visit ODM's website for the most up to date services subject to EVV requirements.

Key Acronyms

Acronym	Definition
Alt EVV	Alternate Electronic Visit Verification System: Any EVV system that is not Sandata's EVV system
BYOD	Bring Your Own Device
DAS	Ohio Department of Administrative Services
DODD	Ohio Department of Developmental Disabilities
DCW	Direct Care Worker
EVV	Electronic Visit Verification
FFS	Fee-for-Service: A payment model under which a provider is paid directly by Ohio Departments of Medicaid, Aging, or Developmental Disabilities
GPS	Global Positioning System
MCO	Managed Care Organization
MVV	Sandata Mobile Visit Verification is also referred to as Sandata Mobile Connect.
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
OH | ID	An account used to access many State of Ohio websites with a single username and password
PDN	Private Duty Nursing
PIMS	PASSPORT Information Management System
PNM	Provider Network Management

Acronym	Definition
SMC	Sandata Mobile Connect: Sandata's Mobile Visit Verification application
TVV	Telephonic Visit Verification: System used to record visit data and verification when Sandata Mobile Connect is not available

2. System Overview

Module Objectives

- Access and log in to Sandata EVV.
- Navigate Sandata EVV with or without Americans with Disabilities Act support.
- Define common functions within Sandata EVV.

Key Terminology

Term	Definition
ADA	Americans with Disabilities Act: a civil rights law that prohibits discrimination based on disability
JAWS	Job Access with Speech: 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
NVDA	Non-Visual Desktop Access: A computer screen reader program that allows blind and visually impaired people to interact with Windows Operating Systems and other third-party applications

Browser Requirements

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

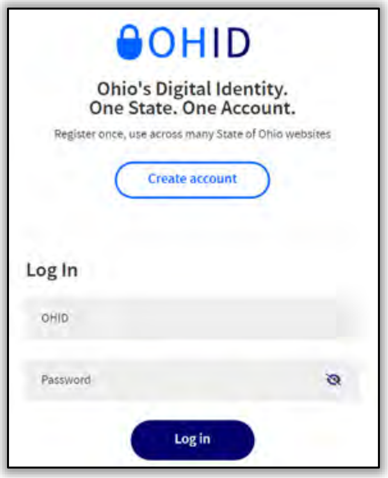
Access and Login to Sandata Electronic Visit Verification

Each agency has a set of login credentials, which are connected to an Ohio identity (OH | ID). For help locating or updating your OH | ID, please contact the Ohio Department of Medicaid. For assistance updating a password, review OH | ID Password Help.

Complete the following steps to access Sandata EVV for the first time.

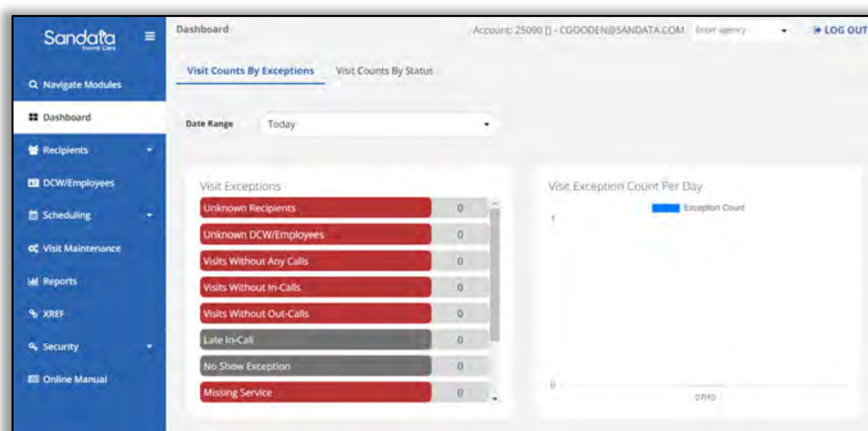
1. Navigate to the Sandata On-Demand login screen, then select **Log in with OH | ID.**

2. Enter your OH | ID and your password, then select **Log In**.



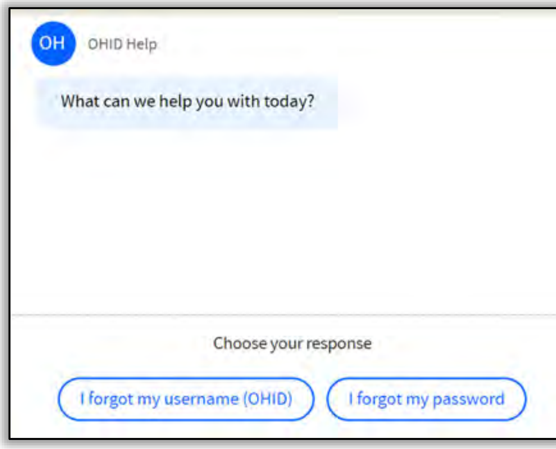
3. If you have access to more than one Sandata EVV account, you will be prompted to select an account. If you do not have access to more than one account, you will be automatically signed in.

The dashboard screen displays.



Login Assistance

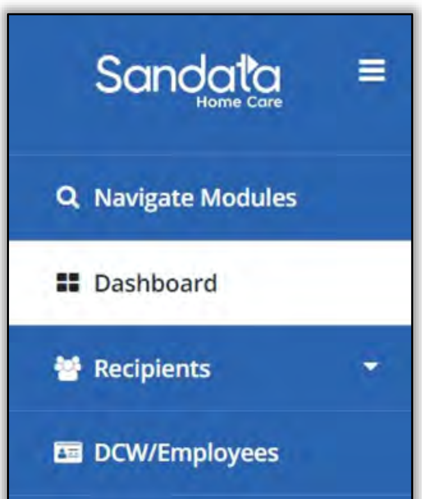
Select **Forgot your OH | ID or password** if you are having trouble signing in. A popup will appear with additional login assistance.



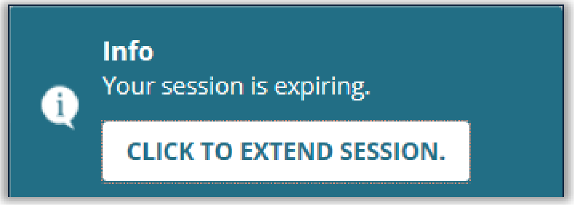
Americans with Disabilities Act Navigation Support

Sandata EVV supports screen-reading technologies. You can also navigate using only the keyboard. Use 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.

Select **Navigate Modules** to type in a module name. A link to the screen appears below the field.

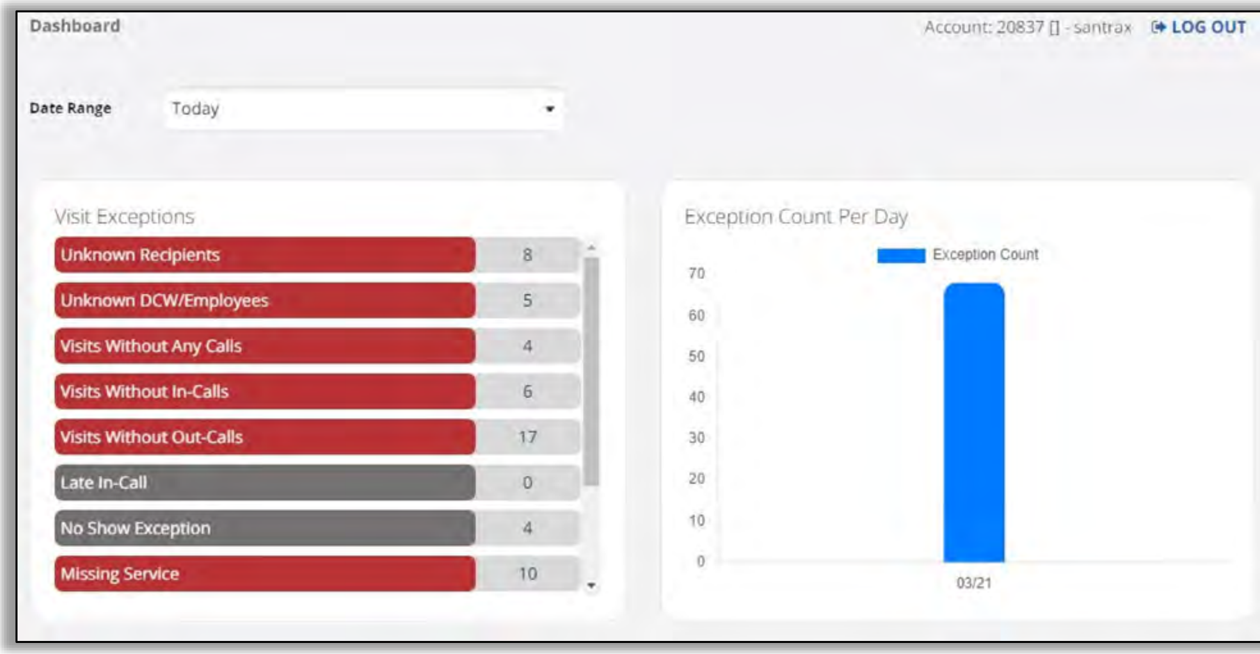


To accommodate users who require more time, when a user remains idle for 15 minutes, the system displays a warning message asking if they require more time. If the user does not respond to the prompt within 2 minutes, Sandata EVV automatically times out.

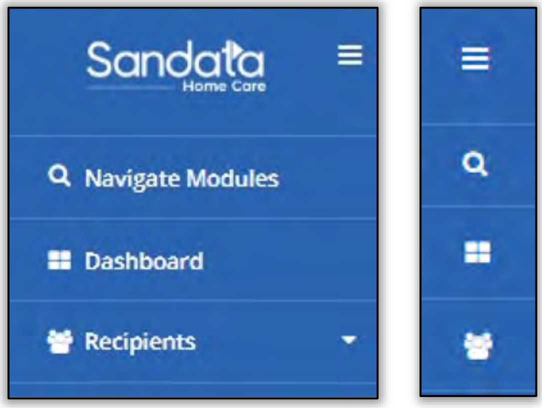


Navigating the Sandata Portal

After successful login, the dashboard screen displays as the default screen.



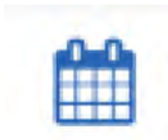
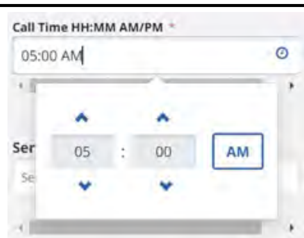
Select the 3 lines at the top of the navigation panel to collapse the view. Select the 3 lines again to expand the view.

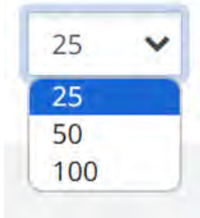
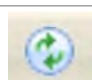


Icons and Descriptions

Icons appear consistently throughout the Sandata EVV system. Use the table below for reference.

Icon	Title	Description
ADD	Add	Add a value.
APPLY FILTERS	Apply Filters	Search for results that match the filters you have applied.
>	Arrow (Single Right)	Move one value or move one-page forwards.
»	Arrow (Double Right)	Move all values forward or move to the end of the data set.
<	Arrow (Single Left)	Move one value or move one page backward.
«	Arrow (Double Left)	Move all values backwards or move to the beginning of the data set.

Icon	Title	Description
	Asterisk	Indicates a required field
	Calendar	Displays a calendar from which you can select a date.
	Cancel	Cancel the action and do not save progress.
	Check Box	Select or more values
	Clear	Clears a search field or series of search fields
	Clock	Select a time.
	Edit	Open a record with its fields in an editable state.
	Exception	An indicator of missing or inaccurate visit data
	Expand	Expand a field.
	Export	Export a record to a file type of your choice.
	Filters	Select parameters for search results.

Icon	Title	Description
	History	View a list of actions taken on a page.
	Items per Page	Select how many rows of a list are displayed on each page.
	Lock	Indicates a field cannot be modified
	Log Out	Logs you out of the system and displays the log-in screen
	Next	Go forward to the next step.
	Page Listing	A button to go to the start and end of a list, along with the ability to display any individual page of the list
	Previous	Go back to the last step.
	Radio Button	Make a single selection.
	Refresh	Update the page in real time.
	Remove	Remove a value.
	Reset	Clear saved search settings.
	Save	Save the process.

Icon	Title	Description
SAVE SETTINGS	Save Settings	Save selected search fields so that they will be displayed again at the next login.
	Show	Show a field.
	Show List	Select the down arrow to view multiple options.
	Sort List	Select to sort contents in ascending or descending order.
	Toggle	Enable a specific parameter.
of 130 entries	Total Items	The total number of rows in the list
•••	View More	See more details.

3. Resources

Module Objectives

- Access help options from within the Sandata Electronic Visit Verification portal.

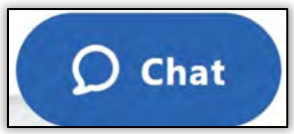
Sandata Help Button

The Chat bubble allows you to open a chat with the EVV Provider Hotline.

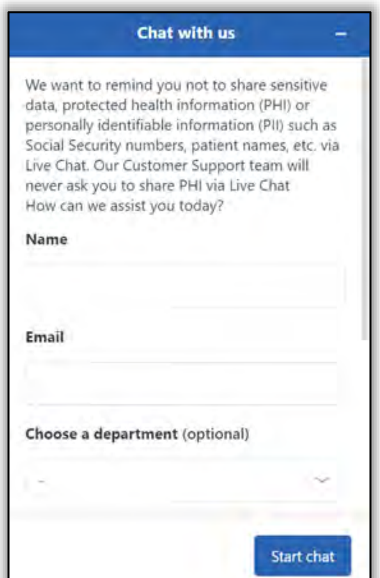
> **NOTE:** Please do not enter personal health information (PHI) in the Chat.

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

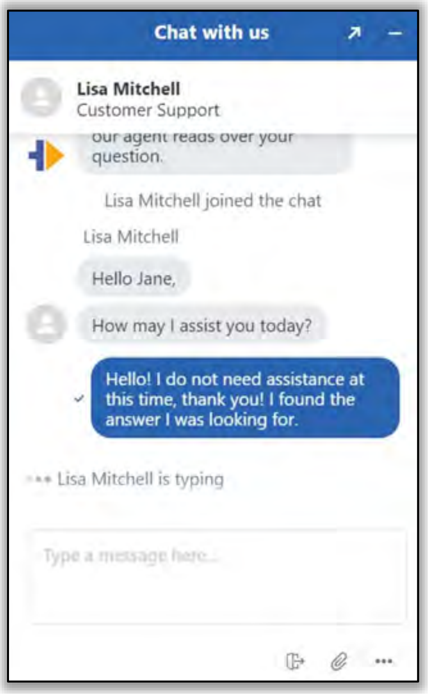
1. Select the **Chat** button.

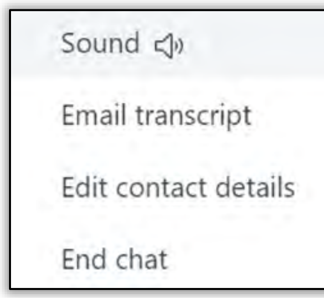


2. The chat window appears. Complete the Name and Email fields. The Phone Number and Message fields are optional. When you are ready to chat, select **Start chat**.

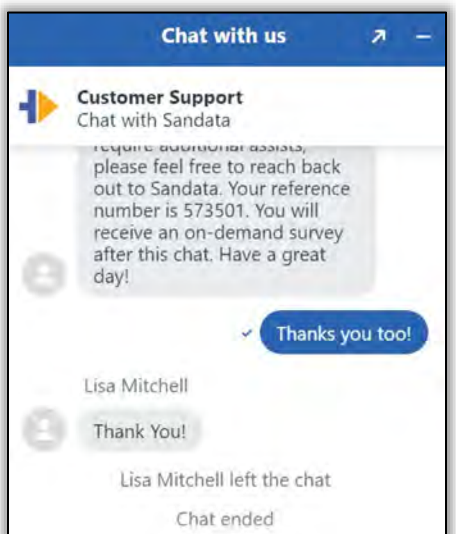


3. An agent will join the chat. Type in your responses and select **Enter** to send. You may also use the attachment icon to attach images. Select the 3 dots **(...)** to adjust the volume of the chat notifications, email a copy of the chat transcript, change your contact information, or end the chat.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





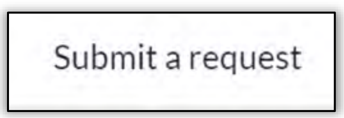
4. A reference number will appear. Select the minus icon **(-)** to minimize and close the chat window.



Sandata On-Demand

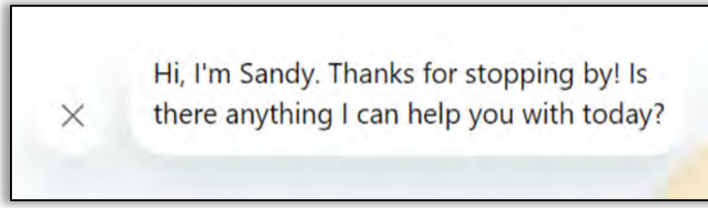
Sandata On-Demand is a single place where you can see any ticket requests that you have made to the EVV Provider Hotline or the Ohio Department of Medicaid. You can also see information about the Sandata solutions, including help materials. Sandata On-Demand is also connected to your OH | ID login. You will not need a new username or password to access.

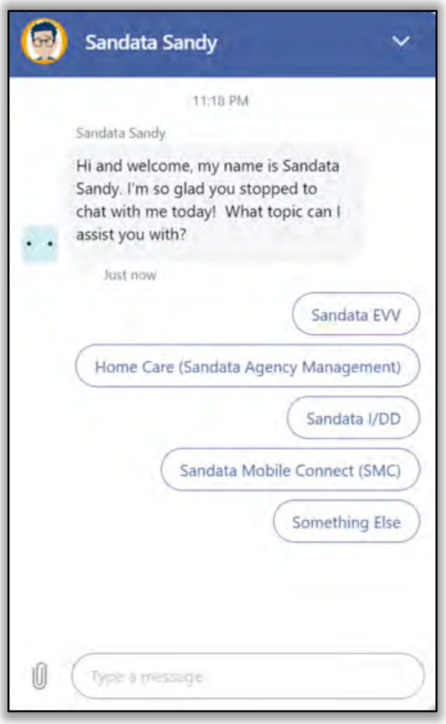
Select **Submit a request** to open a support ticket.



For self-guided help, type your question into the Search bar.

You can also type a question into the Chat bot in the lower right-hand corner of the screen.





Tiles along the bottom of the screen will guide you to release notes, system help, and other Sandata announcements.

NOTE: The Sandata On-Demand system may display information for other programs. For Ohio specific help, please refer to this system user training guide.

4. Security (Staff Records) for Agency Providers

NOTE: This section does not apply to independent providers.

Module Objectives

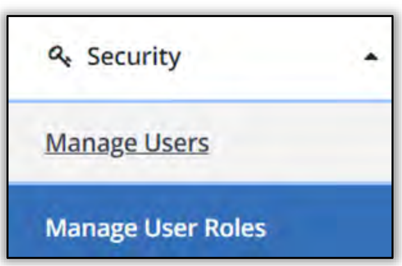
- Access the security module.
- Create and manage users.
- Create and manage user roles.

Key System Terminology

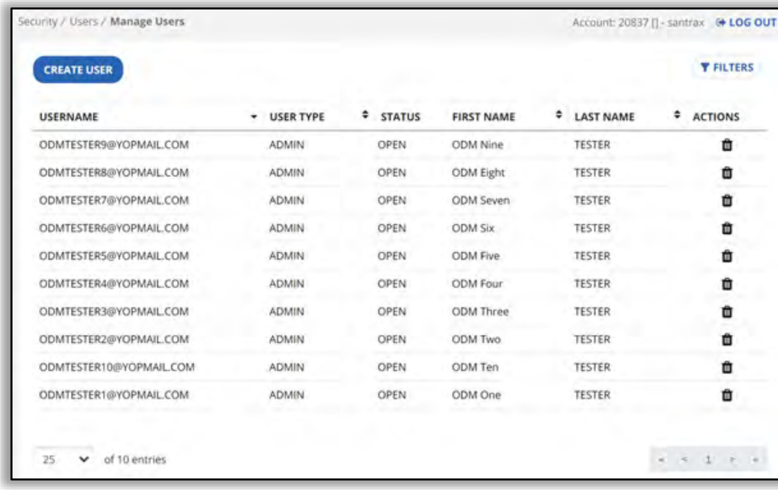
Term	Definition
Administrator	The person at the agency with the ability to create new users, assign roles, system privileges and reset passwords
Recipient	A person who receives services through the Medicaid program, known in Ohio as the Medicaid Member
Privilege	A single permission
Permission	An action that the user can take in the system, or a screen that the user can see in the system
Role	A group of privileges or permissions assigned to the user which allows the user to perform visit activities in Sandata EVV
Security	The module in Sandata EVV where users or office staff are set up to use the system
User	A person with the ability to create and/or manage visit information in Sandata EVV
Username	The user's email address

Manage Users Overview

A user record determines who can access Sandata EVV and which screens and options are included. You can search, create, modify, lock, and deactivate user records.

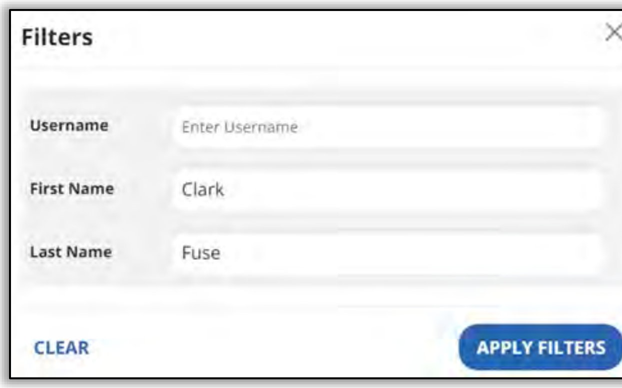


When you select **Manage Users**, the list of existing user records will display.



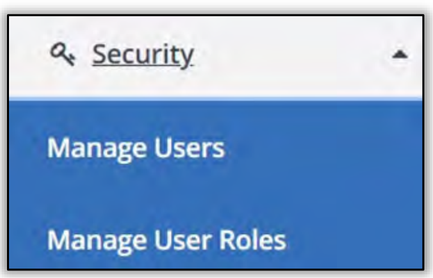
USERNAME	USER TYPE	STATUS	FIRST NAME	LAST NAME	ACTIONS
ODMTESTER9@YOPMAIL.COM	ADMIN	OPEN	ODM Nine	TESTER	
ODMTESTER8@YOPMAIL.COM	ADMIN	OPEN	ODM Eight	TESTER	
ODMTESTER7@YOPMAIL.COM	ADMIN	OPEN	ODM Seven	TESTER	
ODMTESTER6@YOPMAIL.COM	ADMIN	OPEN	ODM Six	TESTER	
ODMTESTER5@YOPMAIL.COM	ADMIN	OPEN	ODM Five	TESTER	
ODMTESTER4@YOPMAIL.COM	ADMIN	OPEN	ODM Four	TESTER	
ODMTESTER3@YOPMAIL.COM	ADMIN	OPEN	ODM Three	TESTER	
ODMTESTER2@YOPMAIL.COM	ADMIN	OPEN	ODM Two	TESTER	
ODMTESTER10@YOPMAIL.COM	ADMIN	OPEN	ODM Ten	TESTER	
ODMTESTER1@YOPMAIL.COM	ADMIN	OPEN	ODM One	TESTER	

To look for a specific record, use the **Filter** option on the right side of the screen.



Creating a New User

1. Select **Security**, then select **Manage Users**.

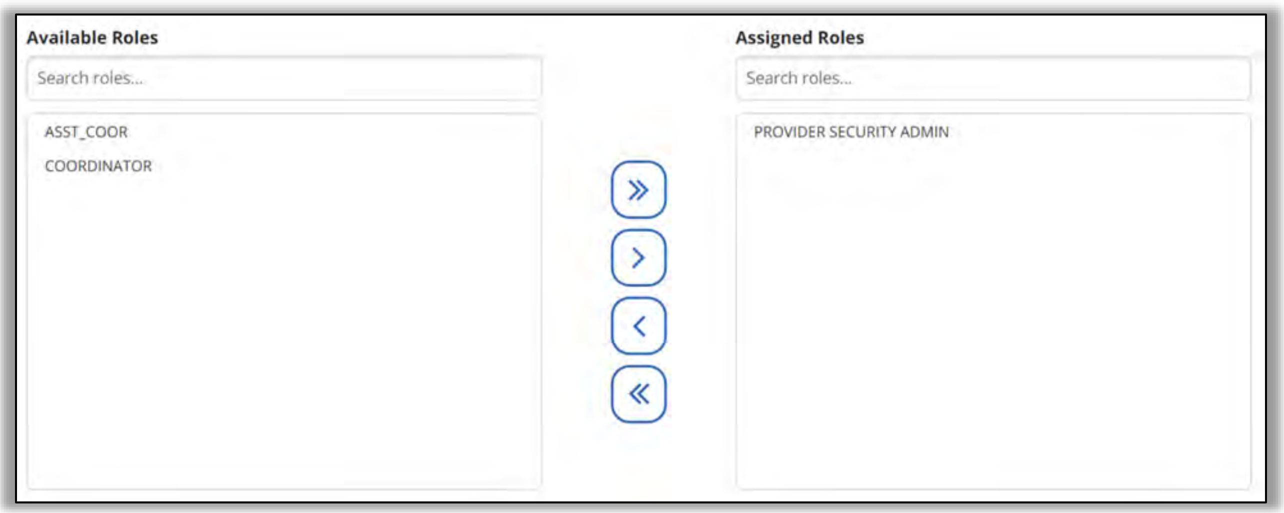


2. Select **CREATE USER.**

3. Enter or confirm the user's email address, last name, and first name.

NOTE: The **Locked** toggle prevents the user from logging into the system. Leave this field unchecked to allow the user to log in.

4. Select the appropriate item in the Available Roles field and select 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 if needed.

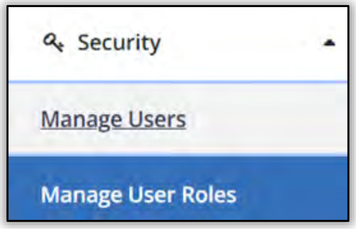


The Recipient, DCW or Employee, and Supervisor fields are not applicable currently. Scroll to the bottom of the screen and select **Create User**.

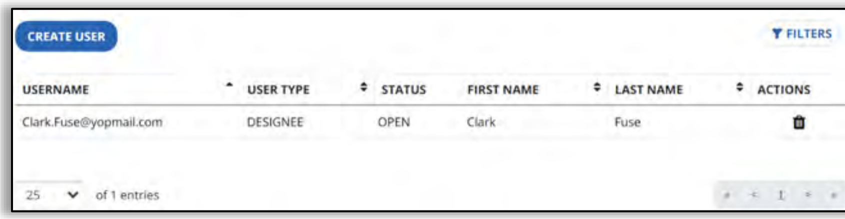
Modifying a User

Use the modify user functionality if the account is locked, or their role changes within the organization. A user record can be modified at any time.

1. Select **Security**, then select **Manage Users.**



2. Select the username line to re-open the record.

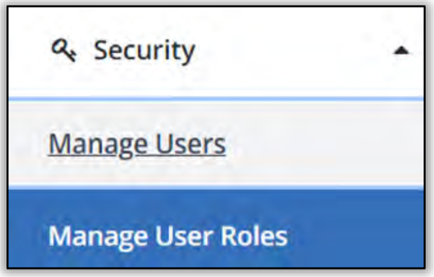


3. Make any changes, then select **SAVE CHANGES**.

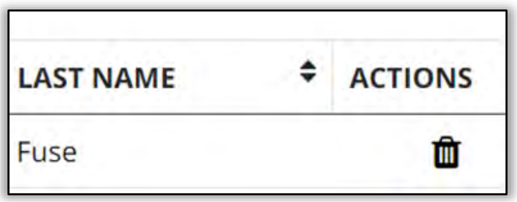
Deleting a User

Delete the user record to revoke staff member credentials. Deleting a user record will not remove the history of edits made by that user in Sandata EVV and will not impact other sites that are associated with the user's OH | ID credentials. If the staff member requires access to Sandata EVV in the future, a new record can be created. Complete the following steps to delete a user record.

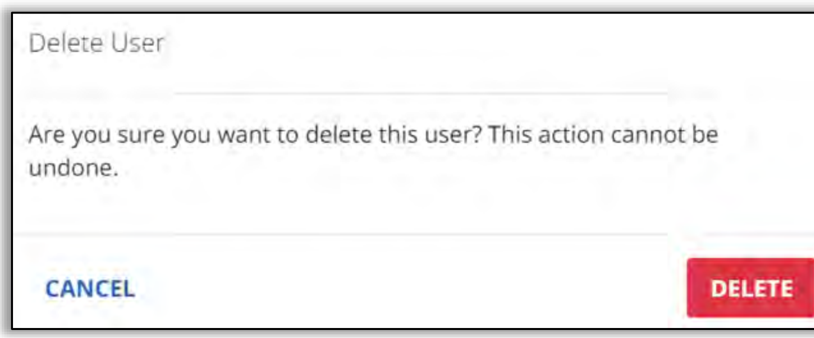
1. Select **Security**, then select **Manage Users.**



2. Select the **trash can** icon next to the user.



3. A confirmation appears. Select **DELETE.**



Manage User Roles Overview

The use of roles allows certain administrators to tailor a set of system functions for each job title or function 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.

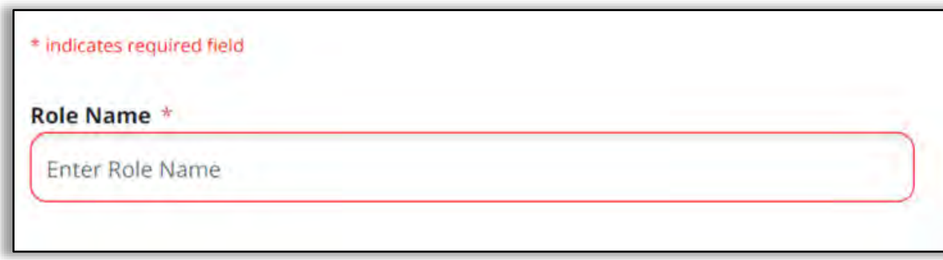
Default Role	Description
ASST_COOR (Assistant Coordinator)	Sandata EVV generalist that supports the coordinator. This role has view-only access to visit records and run reports.
COORDINATOR	This role has privileges to intake/manage Recipients, intake/manage DCW/Employees and clear visit exceptions.
PROVIDER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

Creating a New User Role

1. Select **Security**, then select **Manage User Roles.**

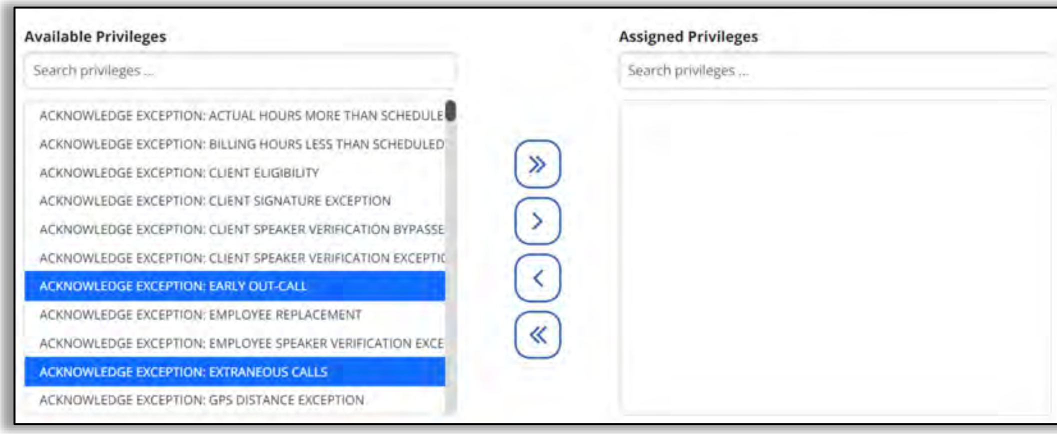
2. Select **CREATE USER ROLE.**

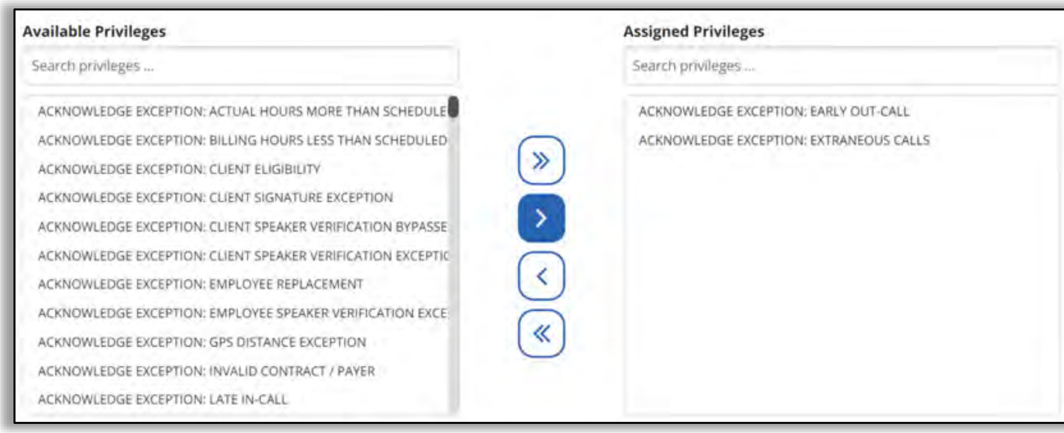
3. Enter a name for the new role in the Role Name field.



4. Enter a brief description in the Role Description field.

5. Select Available Privileges to highlight, then select the **>** arrow to assign the privilege to the role.





6. Select **CREATE USER ROLE** in the bottom right-hand corner of the screen**.**

Modifying User Roles

Making changes to a role impacts all users with that role assignment the next time they log in to the system. This includes modifying or deleting roles.

> **NOTE:** As a best practice, you should not modify or delete the user roles that have been loaded into EVV. These roles are designed to best suit your agency's needs.

Complete the following steps to modify a user role.

1. Select **Security**, then select **Manage User Roles.**

2. Select the Role Name to open the user role.

3. Edit **Available Privileges** using the navigation keys.

4. Select **SAVE CHANGES** in the bottom right-hand corner of the screen. A successful confirmation message displays.

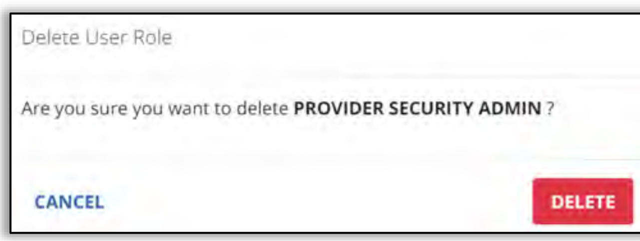
Deleting User Roles

Complete the following steps to delete a user role.

1. Select **Security**, then select **Manage User Roles**.

2. Select the **trash can** icon under the Actions column. The **lock** icon indicates that the role cannot be modified.

3. A confirmation appears, select **DELETE**.



5. Recipient Records

Module Objectives

- Search for a Recipient.
- Add a Recipient’s record.
- Update a Recipient’s record.
- Delete/close a Recipient’s record.

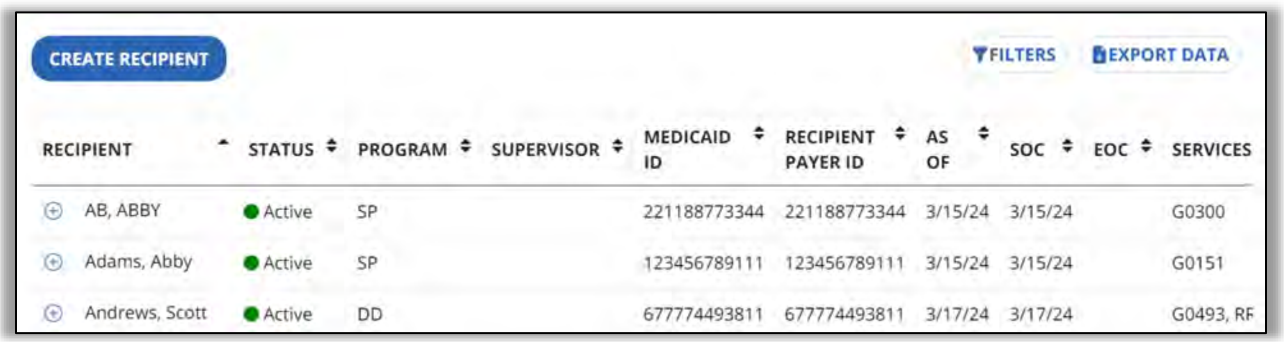
Key Terminology

Term	Definition
Recipient	A person who receives services through the Medicaid program., known in Ohio as a Medicaid Member

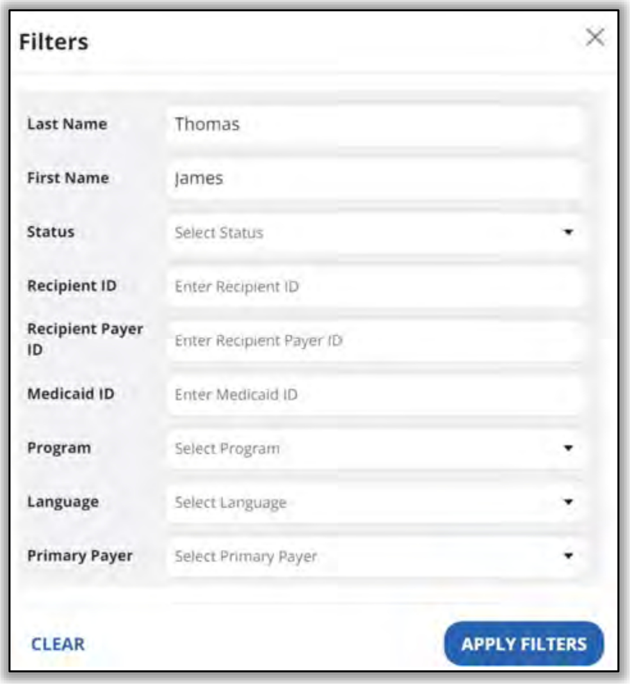
Recipient Records Overview

The Recipient module contains the payer, program, and service details, address, and schedules, if applicable.

When you select **Recipient Management**, the list of active Recipient records will display.



To look for a specific record, use the **Filter** option on the right side of the screen.

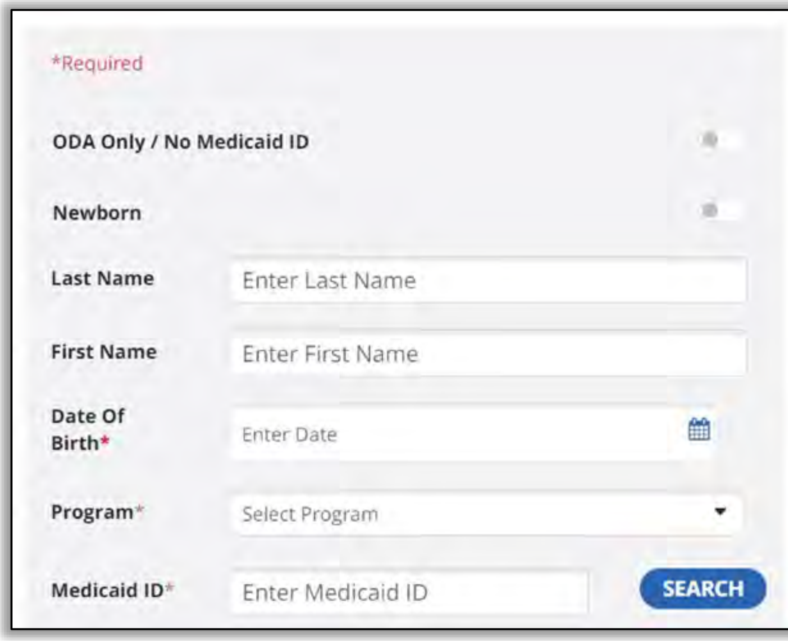


Creating a New Recipient Record

1. Select **Recipients,** then select **Recipient Management.**

2. Select **CREATE RECIPIENT.**

3. A popup appears. Complete all required fields, then select **SEARCH.**

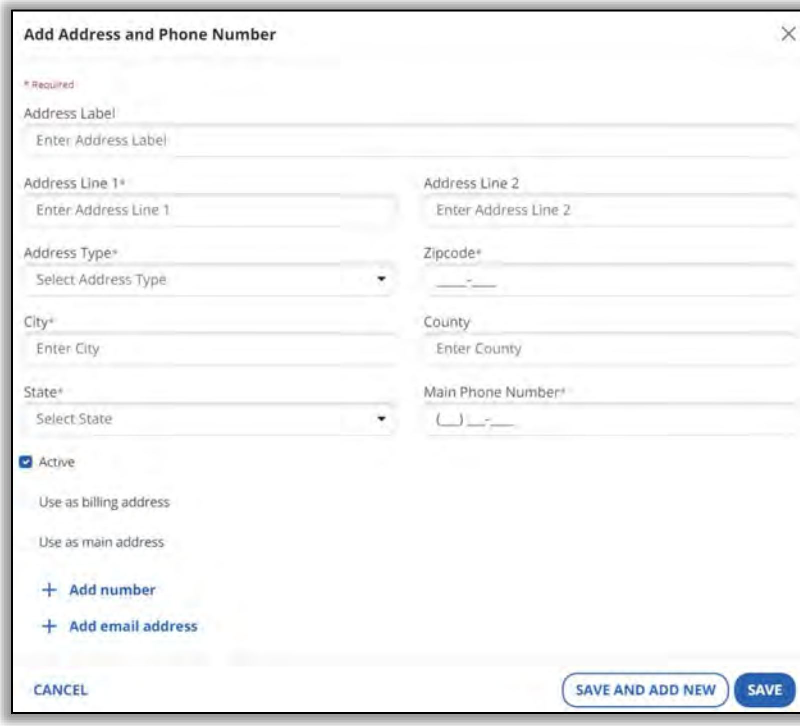


4. If a match is found, the screen will refresh and include Recipient details. Select **CREATE RECIPIENT.**

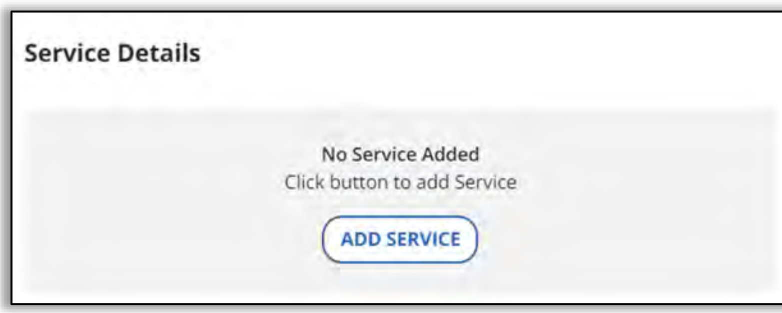
5. The Recipient record loads in a pending status. There are required fields in the Personal and Program tabs. All required fields will have an asterisk (*).

6. In the Personal tab, select scroll down to the addresses and phone numbers tile, and select **ADD.**

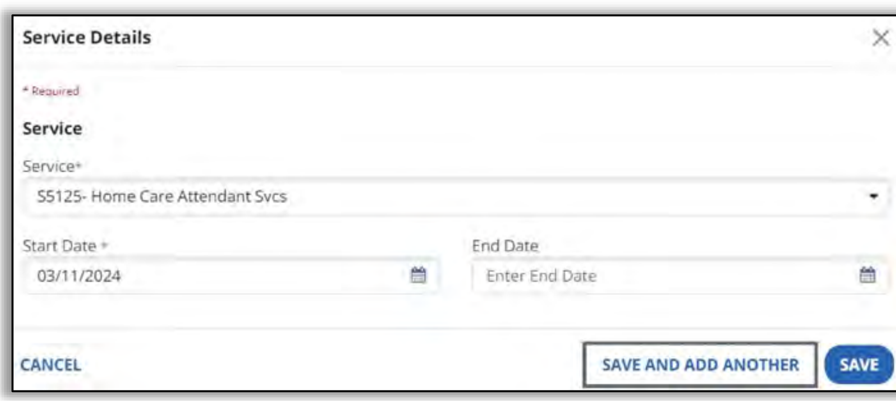
7. Complete all required fields, then select **SAVE.**



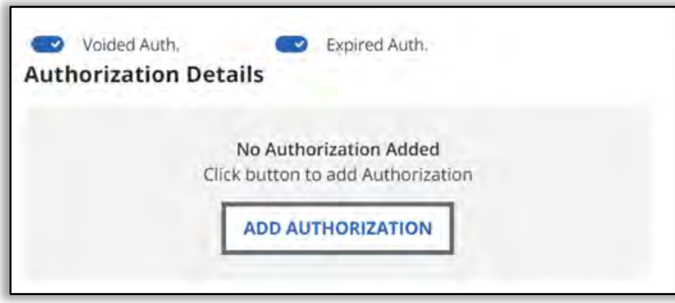
8. In the Program tab, select **ADD SERVICE.**



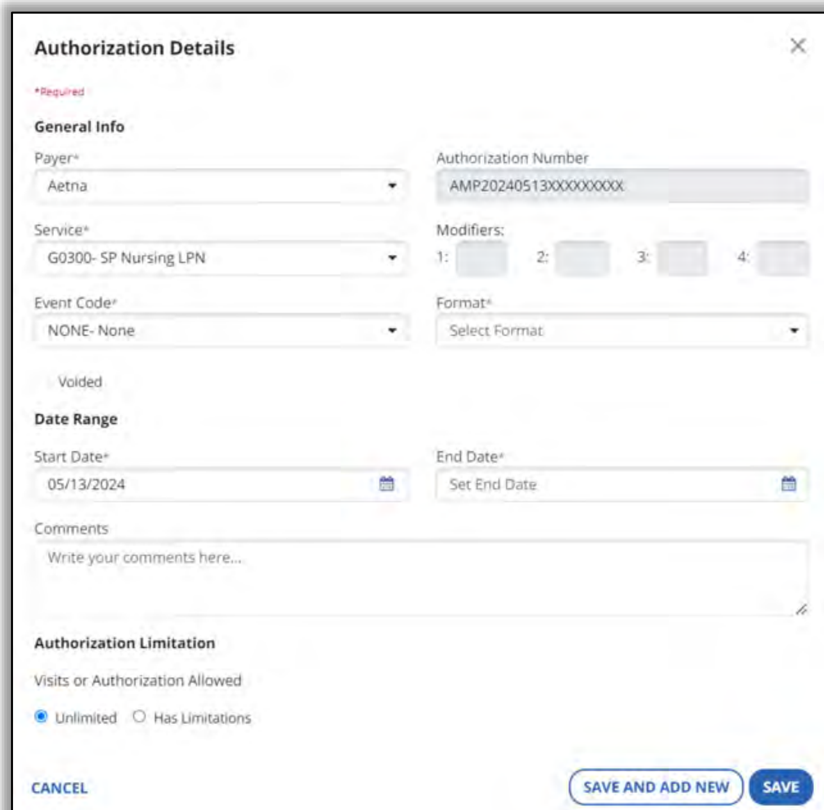
9. Complete all required fields, then select **SAVE.**



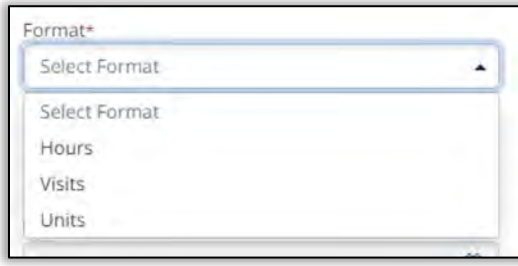
10. Select **ADD AUTHORIZATION.**



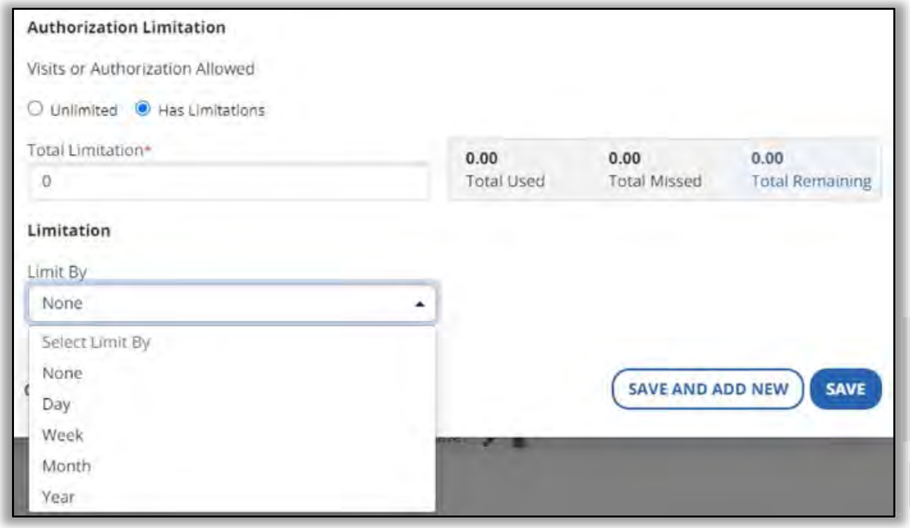
11. Complete all required fields, then select **SAVE**.



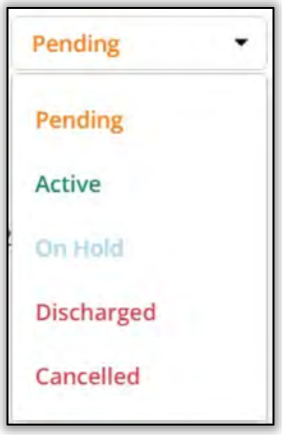
a. The Format selection must match the selection made when creating a schedule for the recipient. For example, if units are selected in the authorization, the schedule must be created in units.



b. Authorization Limitations can be added to restrict the amount of time recorded within a specific range of days, weeks, months, or years.



12. Select the status drop-down in the upper right corner of the screen, then select **Active.**

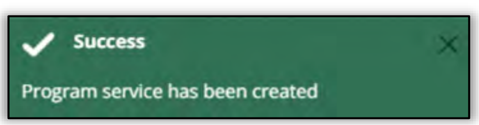


Modifying an Existing Recipient Record

1. Select **Recipients,** then select **Recipient Management.**

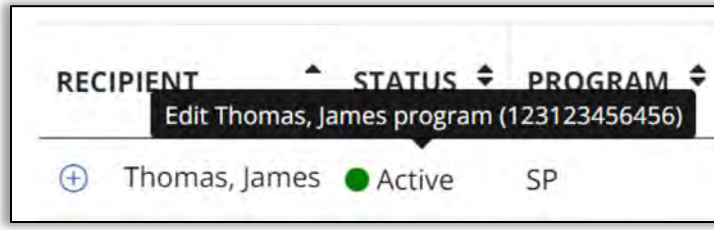
2. Select anywhere along the line to re-open the record.

3. Make any changes. A message will appear after each change, that confirms the change that was made.

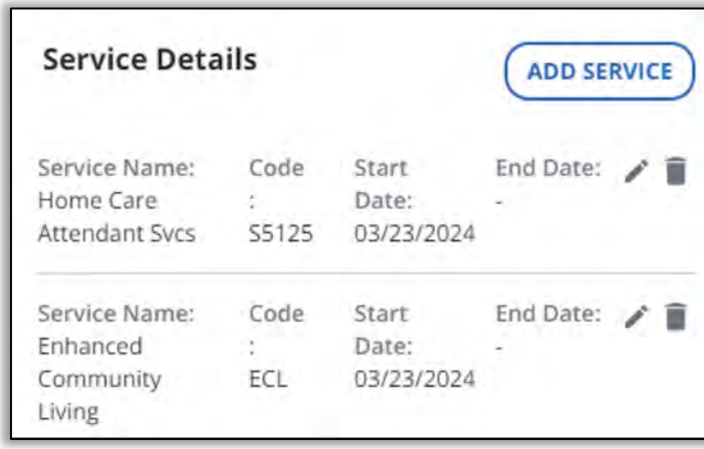


Service Details

1. Select the Recipient Status to reopen the record.



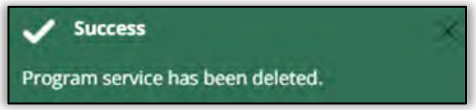
2. Scroll down to the Service Details.



a. Select **ADD SERVICE** to add a new service.

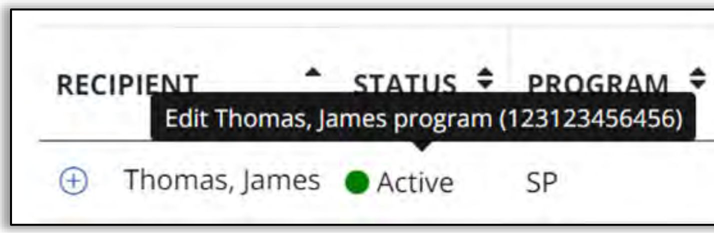
b. Select the **pencil** icon to edit an existing service.

c. Select the **trash can** icon to delete an existing service.

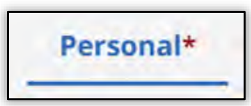


Contact Information

1. Select the Recipient Status to reopen the record.

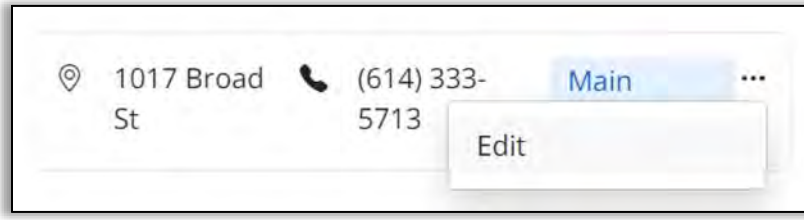


2. Select the Personal tab, then scroll down to Addresses and Phone Numbers.



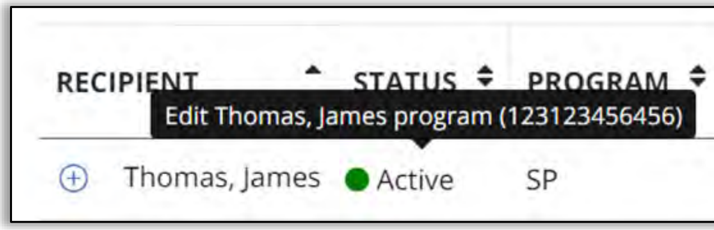
3. Select **ADD** to add a new address, email, or phone number. When you are finished, select **SAVE.** If you are adding multiple addresses or phone numbers, select **SAVE AND ADD NEW**.

4. To edit the existing details, select the 3 dots **(...)** to the right.

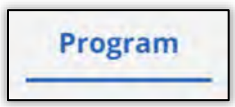


Record Status

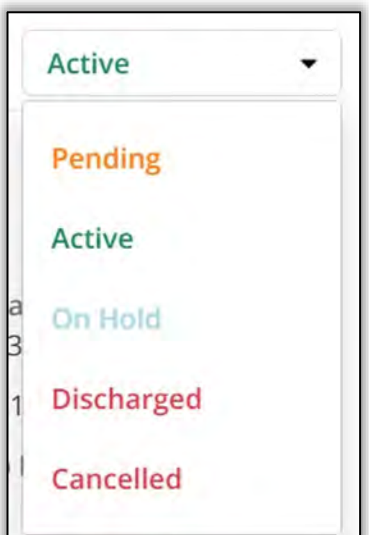
1. Select the **Recipient Status** to reopen the record.



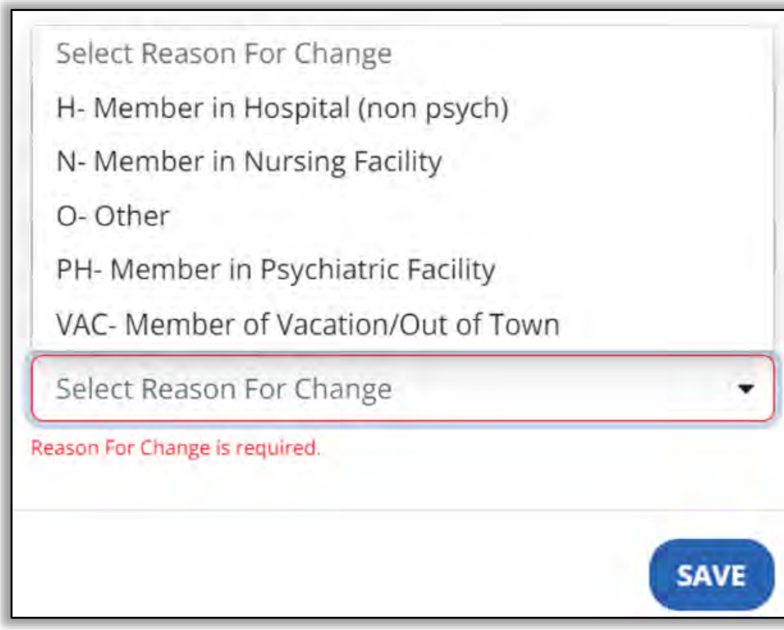
2. Select the **Program** tab.



3. In the upper right-hand corner, select the **New Status**.



4. Select the Reason for Change, then select **SAVE.**



6. Direct Care Worker or Employee Records

Module Objectives

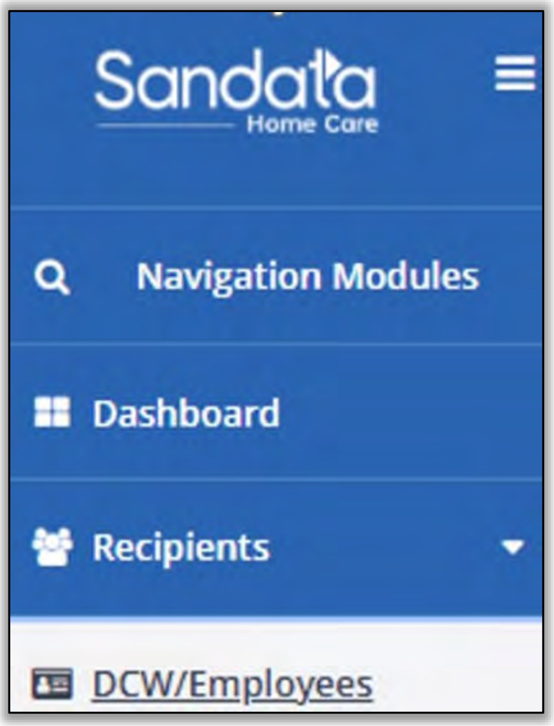
- Agency Providers:
  - Search for a DCW/Employee record.
  - Add a DCW/Employee record.
  - Update a DCW/Employee record.
  - Delete or close an DCW/Employee record.
- Independent Providers:
  - Reset your TVV passcode.

Key Terminology

Term/Acronym	Definition
DCW or Employee	Direct Care Worker or Employee: A person who is employed by an agency provider to provide care to one or more Recipients.

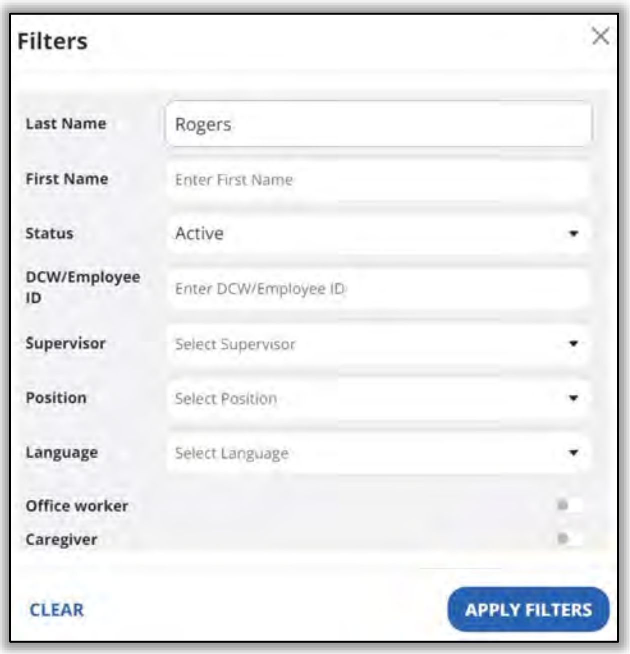
DCW or Employee Records Overview

DCW or Employee records are required for any agency provider that will be recording times for EVV services. This record contains basic identifying information, username, and schedules if applicable. The record is created manually and can be modified at any time.



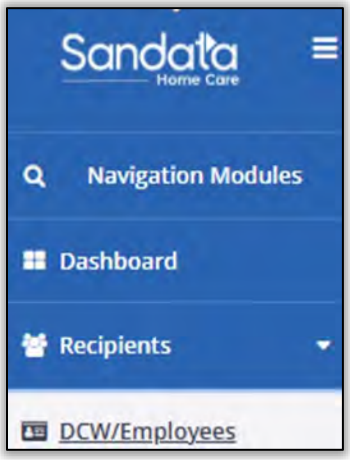
When you select **DCW/Employees**, the list of active records will display.

To look for a specific record, use the **Filter** option on the right side of the screen.

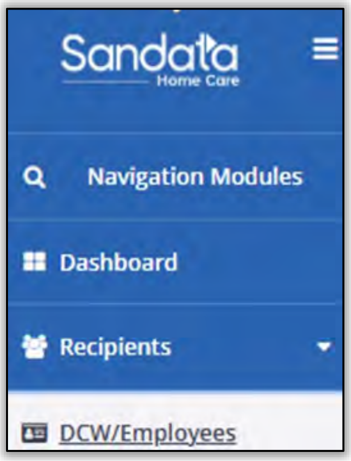


Creating a New Direct Care Workers/Employee Record

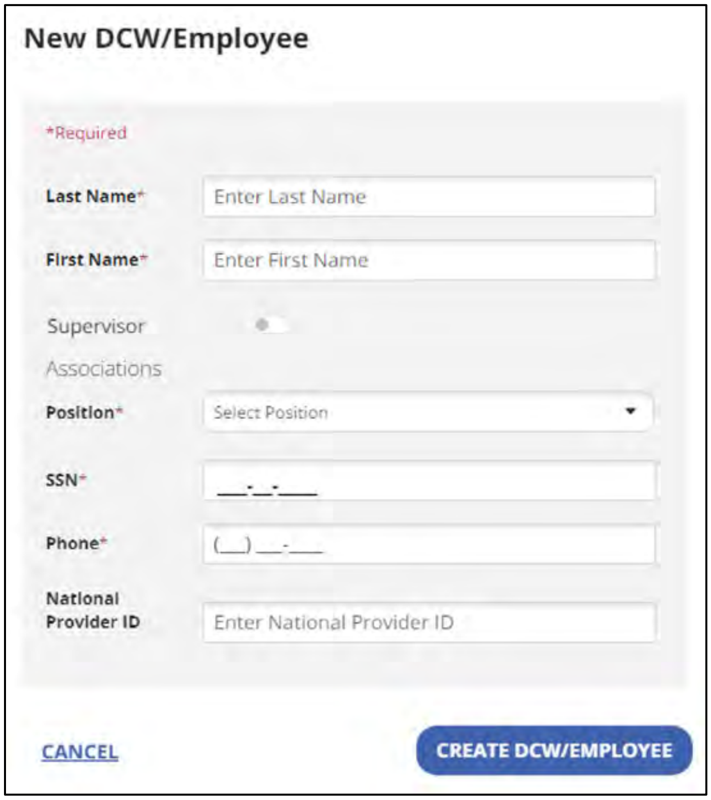
1. Select **DCW/Employees**.



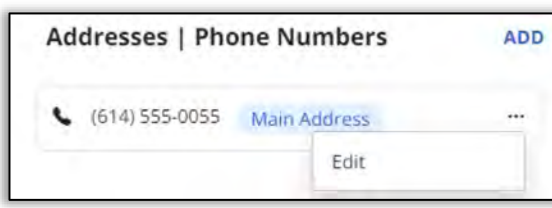
2. Select **Create DCW/Employee.**



3. Complete all required fields in the popup, then select **CREATE DCW/EMPLOYEE.**



4. The screen will refresh to the Personal tab. Scroll down to the Addresses and Phone Numbers section and select the 3 dots **(...)** next to the Main Address**.**



5. If the DCW or Employee will be using Sandata Mobile Connect, complete the following steps:
   a. Check the **Mobile user** box.

   b. Select **Add email address**.

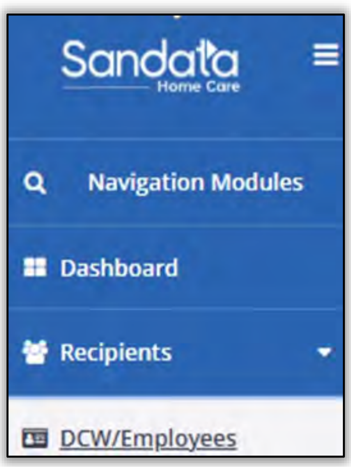
   c. Enter the DCW/Employee email address.

6. Select **SAVE.**

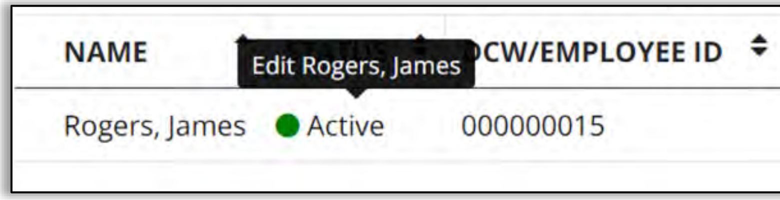
NOTE: Use **Reset Mobile User Password** to reset an SMC password for DCW or Employee in the future.

Modifying an Existing Direct Care Worker/Employee Record

1. Select **DCW/Employees.**



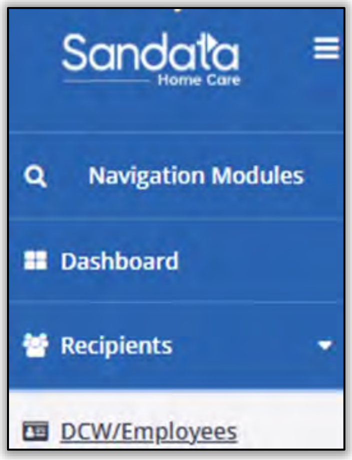
2. Select anywhere along the line to re-open the record.



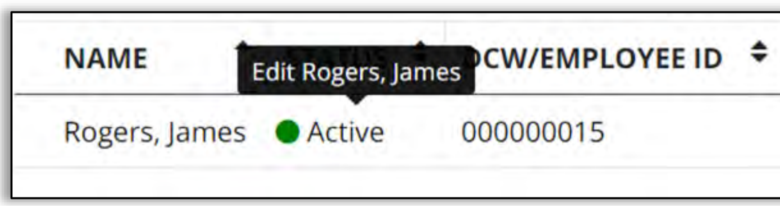
3. Make any changes. A confirmation will appear after each change.

Contact Information

1. Select **DCW/Employees.**

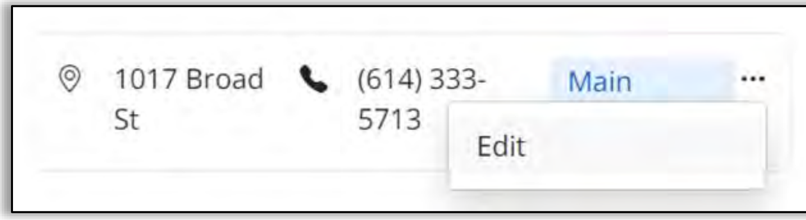


2. Select anywhere along the line to re-open the record.



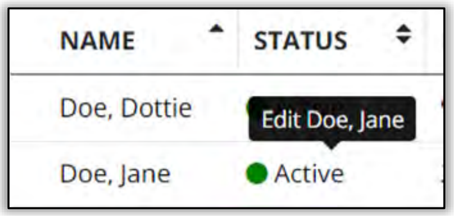
3. Select **ADD** to add a new address, email, or phone number. When you are finished, select **SAVE.** If you are adding multiple addresses or phone numbers, select **SAVE AND ADD NEW**.

4. To edit the existing details, select the 3 dots **(...)** to the right.



Record Status

1. Select the DCW/Employee Status to reopen the record.



2. Select the Personal tab.

3. Select the **pencil** icon in the Identifiers section.

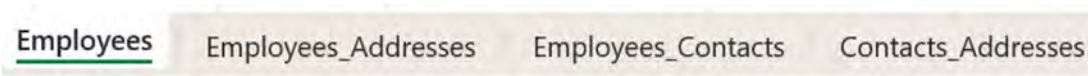
4. Change the status, then select **SAVE.**

Direct Care Worker/Employee Bulk Upload

Agency and Independent providers can upload a batch of DCW/Employee records at one time, instead of entering each record individually.

1. Select **DCW/Employee** from the navigation panel.
2. Select **Import**.
3. Select **Download Template**.
4. Open the template in Microsoft Excel.

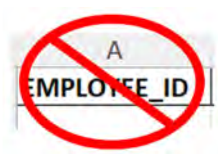
The template will have four sheets at the bottom of the file.



NOTE: When completing the template, it is important to enter the same value across the sheets. For example, the FIRST NAME on the Employees sheet must match the FIRST NAME on the Employees_Addresses sheet.

Import Template – Employees Sheet

1. Do not enter the Employee ID in column A.



2. Enter the following fields, using the table for reference.

B	C	D	E
FIRST_NAME	LAST_NAME	EMPLOYEE_AGENCY_ID	EMPLOYEE_POSITION_ID

M
GENDER

Field	Description
FIRST NAME	The first name of the individual providing care.
LAST NAME	The last name of the individual providing care.
EMPLOYEE AGENCY ID	Enter a value. This value will update when the import is complete.
EMPLOYEE POSITION ID	To assign the role of caregiver, enter **cgv.** To assign the role of office staff, enter **ofc.** To assign the role of Registered Nurse, enter **rn.** To assign the role of Licensed Practical Nurse, enter **lpn.**
GENDER	Enter **male, female,** or **unknown.**
IS SUPERVISOR	If the DCW or Employee is a supervisor, enter **true.** If the DCW or Employee is not a supervisor, enter **false.**

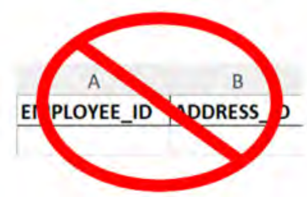
3. Verify the items entered are correct.

A	B	C	D	E
EMPLOYEE_ID	FIRST_NAME	LAST_NAME	EMPLOYEE_AGENCY_ID	EMPLOYEE_POSITION_ID
	Test	Employee	12345	cgv

M	N	O	P
GENDER	BIRTH_DATE	PRIMARY_SPOKEN_LANGUAGE	IS_SUPERVISOR
female			FALSE

Import Template – Employees Addresses Sheet

1. Do not enter the Employee ID or the Address ID in columns A and B.



2. Enter the following fields, using the table for reference.

C	D	E	F	G	H	I	J	K	L	M	N
FIRST_NAME	LAST_NAME	EMPLOYEE_AGENCY_ID	ADDRESS_LINE_1	ADDRESS_LINE_2	TYPE	LABEL	ZIPCODE	CITY	COUNTY	STATE	PHONE_1

R	S	T
EMAIL	IS_ACTIVE	IS_CURRENT

Field	Description
First Name	The DCW or Employee first name
Last Name	The DCW or Employee last name
EMPLOYEE/AGENCY ID	Enter the same value used on the Employees sheet.
ADDRESS LINE 1	The DCW or Employee street number and street name.
TYPE	If this is a business address, enter **business.** If this is a home address, enter **home.** If this is not a home or business address, enter **other.**
ZIPCODE	The five-digit zip code
CITY	The city
STATE	The full state name – do not use an abbreviation
PHONE 1	The ten-digit phone number, without the country code
EMAIL	The email address the DCW or Employee will use for Sandata Mobile Connect
IS ACTIVE?	To import the DCW or Employee as active, enter **true.** To import the DCW or Employee as inactive, enter **false**.
IS CURRENT?	Enter **true.**

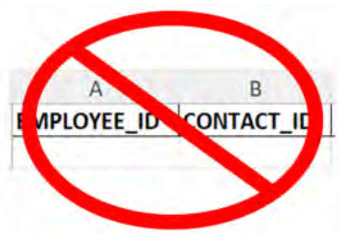
3. Verify the items entered are correct.

C	D	E	F	G	H	I	J	K	L	M
FIRST_NAME	LAST_NAME	EMPLOYEE_AGENCY_ID	ADDRESS_LINE_1	ADDRESS_LINE_2	TYPE	LABEL	ZIPCODE	CITY	COUNTY	STATE
Test	Employee	12345	123 Example Lane		other		43219	Columbus		OH

N	O	P	Q	R	S	T
PHONE_1	PHONE_2	PHONE_3	PHONE_4	EMAIL	IS_ACTIVE	IS_CURRENT
6145555555				testemployee@yopmail.com	TRUE	TRUE

Import Template – Employees Contacts Sheet

1. Do not enter the EMPLOYEE_ID or the CONTACT_ID in columns A and B.



2. Enter the following fields, using the table for reference.

C	D	E	F	G
EMPLOYEE_FIRST_NAME	EMPLOYEE_LAST_NAME	EMPLOYEE_AGENCY_ID	CONTACT_FIRST_NAME	CONTACT_LAST_NAME

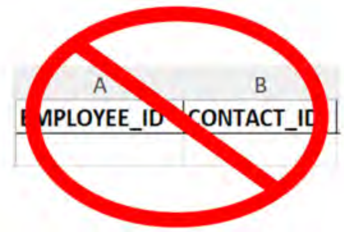
Field	Description
EMPLOYEE FIRST NAME	The first name of the individual providing care. This value must match the FIRST NAME on other employee sheets.
EMPLOYEE LAST NAME	The last name of the individual providing care. This value must match the LAST NAME on other employee sheets.
EMPLOYEE AGENCY ID	Enter the same value used on the Employees sheet.
CONTACT FIRST NAME	The first name of the DCW or Employee contact. This value must match the FIRST NAME on the other contact sheets. This is **not** the Recipient.
CONTACT LAST NAME	The last name of the DCW or Employee contact. This value must match the LAST NAME on the other contact sheets. This is **not** the Recipient.

3. Verify the items entered are correct.

C	D	E	F	G
EMPLOYEE_FIRST_NAME	EMPLOYEE_LAST_NAME	EMPLOYEE_AGENCY_ID	CONTACT_FIRST_NAME	CONTACT_LAST_NAME
Test	Employee	12345	Test	Contact

Import Template– Contacts Addresses Sheet

1. Do not enter the EMPLOYEE_ID or the CONTACT_ID in columns A and B.



2. Enter the following fields, using the table for reference.

Item	Description
EMPLOYEE FIRST NAME	The first name of the individual providing care. This value must match the FIRST NAME on other employee sheets.
EMPLOYEE LAST NAME	The last name of the individual providing care. This value must match the LAST NAME on other employee sheets.
EMPLOYEE AGENCY ID	Enter the same value used on the Employees sheet.
CONTACT FIRST NAME	The first name of the DCW or Employee contact. This value must match the FIRST NAME on the other contact sheets. This is **not** the Recipient.
CONTACT LAST NAME	The last name of the DCW or Employee contact. This value must match the LAST NAME on the other contact sheets. This is **not** the Recipient.
ADDRESS LINE 1	The contact street number and street name
ADDRESS TYPE	If this is a business address, enter **business.** If this is a home address, enter **home.** If this is not a home or business address, enter **other.**
ZIPCODE	The five-digit zip code
CITY	The city
STATE	The two-letter state abbreviation
IS ACTIVE?	Enter **true.**
IS CURRENT?	Enter **true.**

3. Verify the items entered are correct.

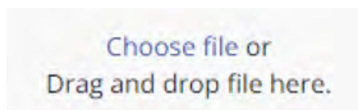
D	E	F	G	H	I
EMPLOYEE_FIRST_NAME	EMPLOYEE_LAST_NAME	EMPLOYEE_AGENCY_ID	CONTACT_FIRST_NAME	CONTACT_LAST_NAME	ADDRESS_LINE_1
Test	Employee	12345	Test	Contact	123 Testing Avenue

K	L	M	N	O	P	Q	R	S	T	U	V	W
ADDRESS_TYPE	ADDRESS_LABEL	ZIPCODE	CITY	COUNTY	STATE	PHONE_1	PHONE_2	PHONE_3	PHONE_4	EMAIL	IS_ACTIVE	IS_CURRENT
home		43219	Columbus		OH	6147777777					TRUE	TRUE

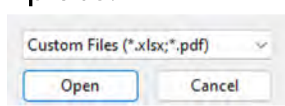
Uploading the Completed Template

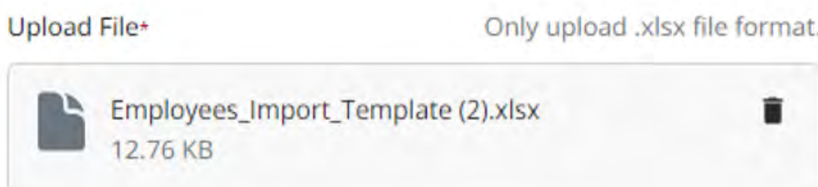
1. Select **DCW/Employee** from the navigation panel.
2. Select **Import**.
3. Enter the **Import Name**.

4. Select **Choose File.**

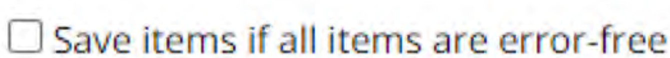


5. Upload your completed template.

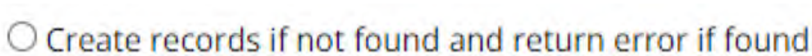




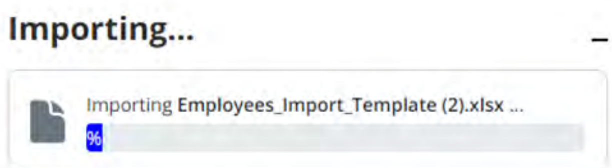
6. Check **Save items.**



7. Check **Create Records.**

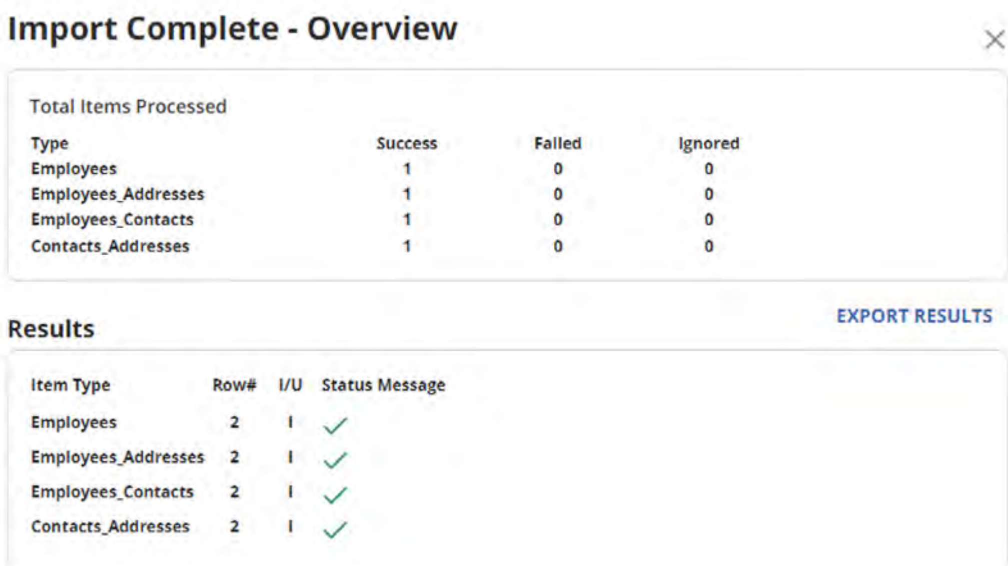


8. Select **IMPORT.**



9. If the file cannot be imported, a text box will appear with the items that need to be fixed. Make edits in the original template, then import again.

10. If the file can be imported, a success message will display with summary details.



Import Complete - Overview

Total Items Processed

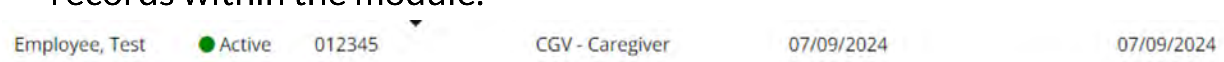
Type	Success	Failed	Ignored
Employees	1	0	0
Employees_Addresses	1	0	0
Employees_Contacts	1	0	0
Contacts_Addresses	1	0	0

Results

EXPORT RESULTS

Item Type	Row#	I/U	Status Message
Employees	2	I	✓
Employees_Addresses	2	I	✓
Employees_Contacts	2	I	✓
Contacts_Addresses	2	I	✓

11. Close the import popup by clicking the **x** in the upper right-hand corner. The DCW or Employee record will appear in the list of active records within the module.

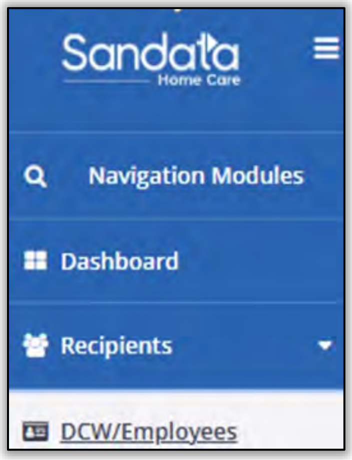


Employee, Test	Active	012345	CGV - Caregiver	07/09/2024	07/09/2024

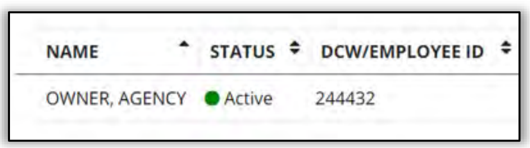
Independent Provider Passcode Reset

Independent providers can reset the Telephonic Visit Verification (TVV) passcode from the DCW or Employee record. Complete the following steps to reset.

1. Select **DCW/Employees** in the navigation panel.



2. You will only see one option on the DCW/Employee homepage. Select your **NAME**.



3. Under the Personal tab, select the **pencil** icon in the Identifiers section.

4. Enter your new passcode, then select **SAVE.**

7. eTRAC and EVV Device Management

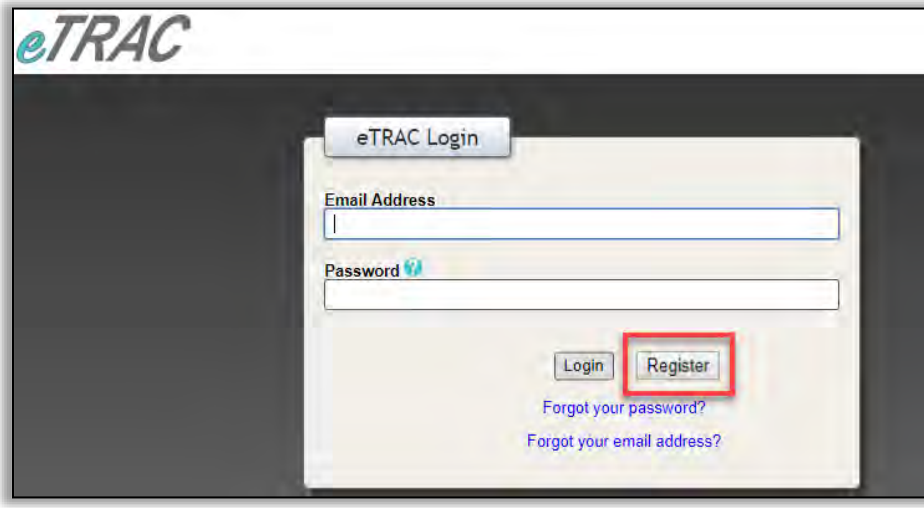
Module Objectives

- Register in the eTRAC Portal.
- Set up a Security Administrator.
- Add additional users.
- Utilize eTRAC functionality, including:
  - Requesting a device for a Recipient in the eTRAC Portal.
  - Replacing a device.
  - Returning a device.

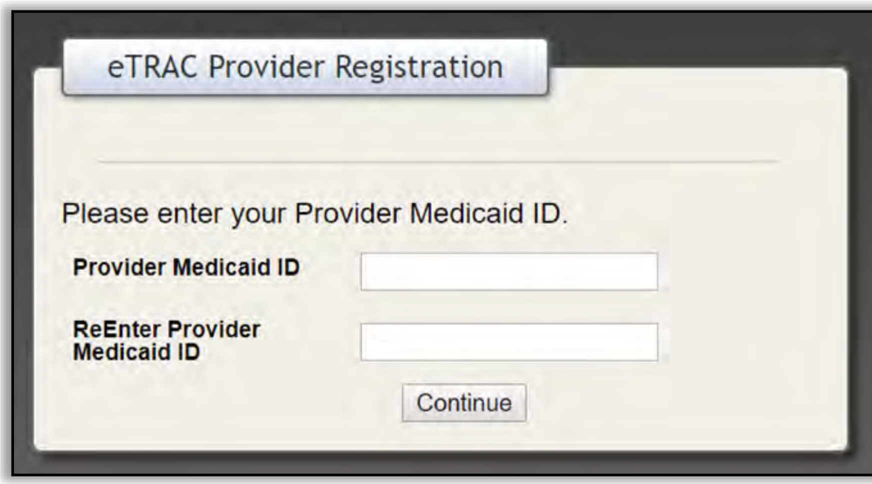
Registering as a Provider in the eTRAC Portal

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.

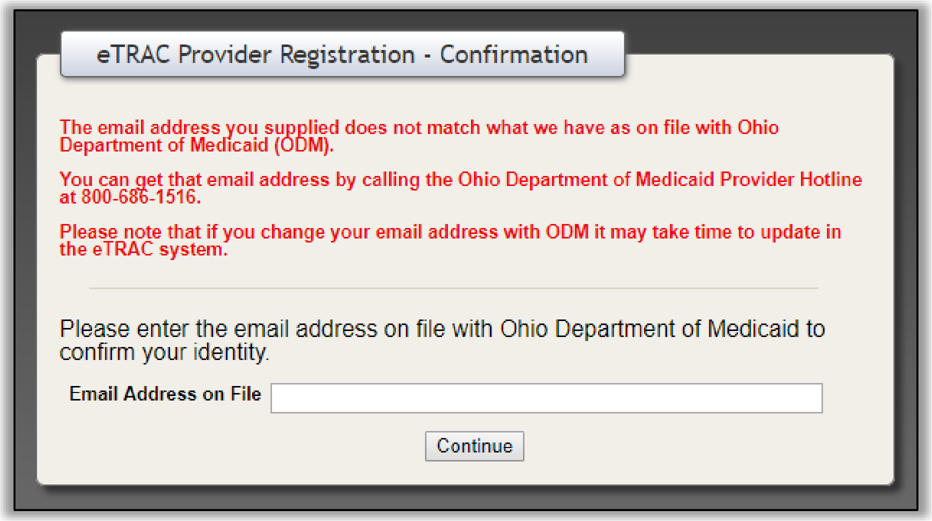
1. Select **Register,** when on the eTRAC website.



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



NOTE: 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 personal identification number (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.

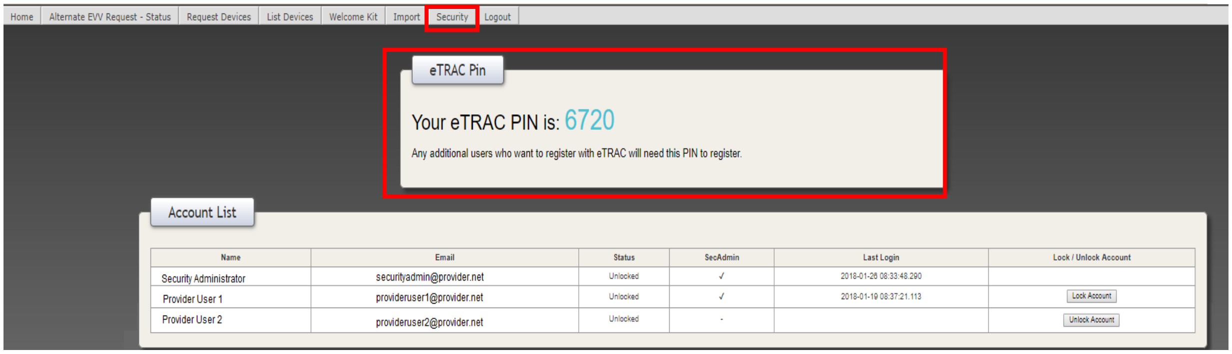
NOTE: Additional users of the same agency will require a security PIN to register themselves with eTRAC. The security PIN can be obtained from the agency eTRAC administrator. This administrator user has a Security tab at the top of the eTRAC menu bar.

5. Select the **I confirm that I am a Medicaid Provider and am authorized to use this system** checkbox to confirm the user is a Medicaid Provider and authorized to use the system.

6. Select **Register Account**.

eTRAC Security Administrators

The first person to register for an account for a Provider ID in eTRAC will become that Provider ID's Security Administrator. A Security Administrator is the person who can now see the Security tab in eTRAC.



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. **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.**

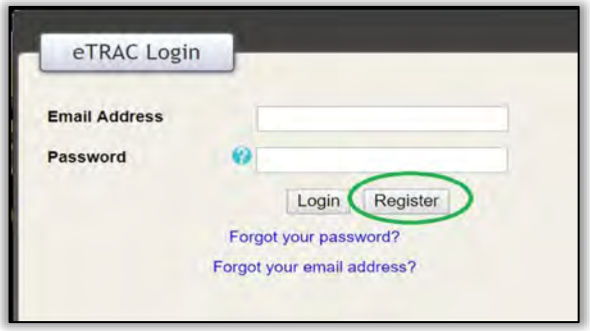
The Security tab will also display all of the users who have registered in eTRAC under your Provider ID, and it will allow the Security Administrator to unlock any user's account, if it becomes locked.

If you would like an additional Security Administrator set up for your Medicaid Provider ID in eTRAC, or if you need the PIN to be reset, please contact the EVV Provider Hotline at 855-805-3505.

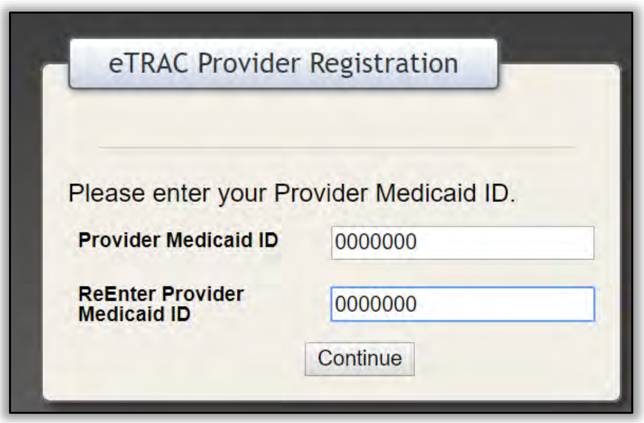
Registering Additional Users in eTRAC

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

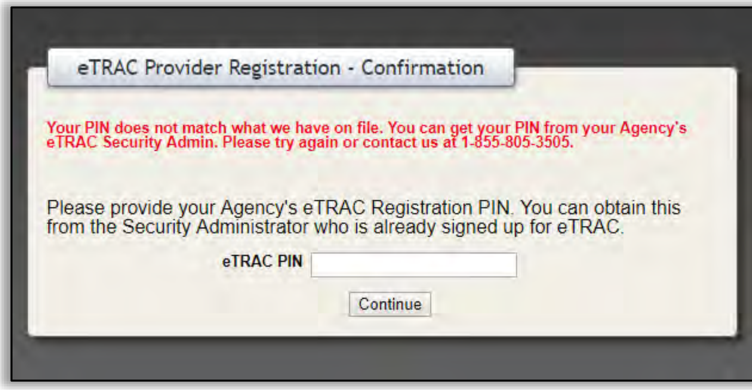
1. Use the following URL to access the eTRAC Portal: https://etraconline.net/login. When on the eTRAC website, select **Register.**



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



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



Welcome Kit Documents

Select **Welcome Kit** to see all the EVV login and visit capture information for your account.

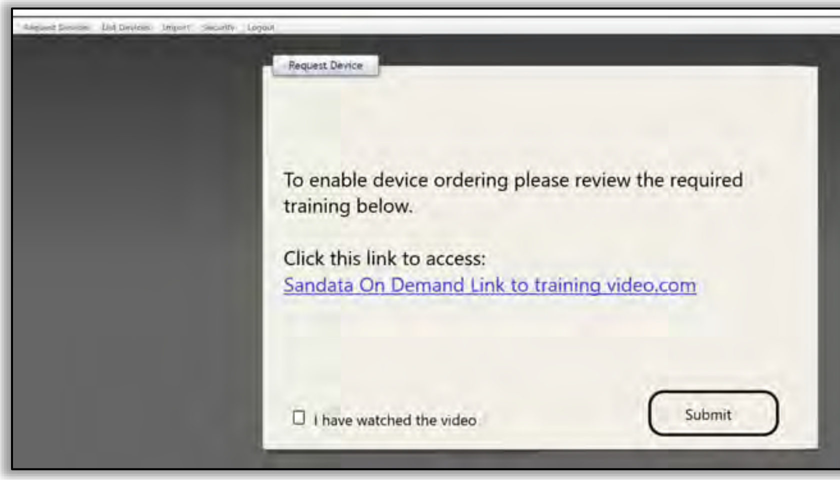
Requesting Devices

Select **Request Devices** to request an EVV device. Devices are not required and can be requested at any time.

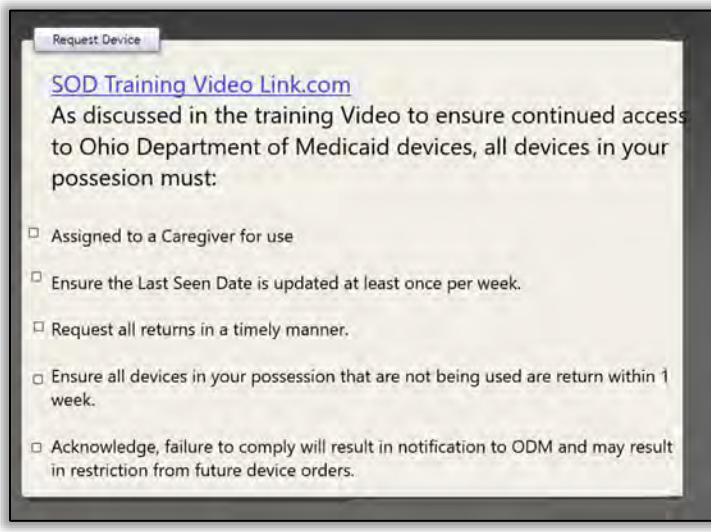
> **NOTE:** Devices will be the sole responsibility of the provider.

1. Select **Request Devices.**

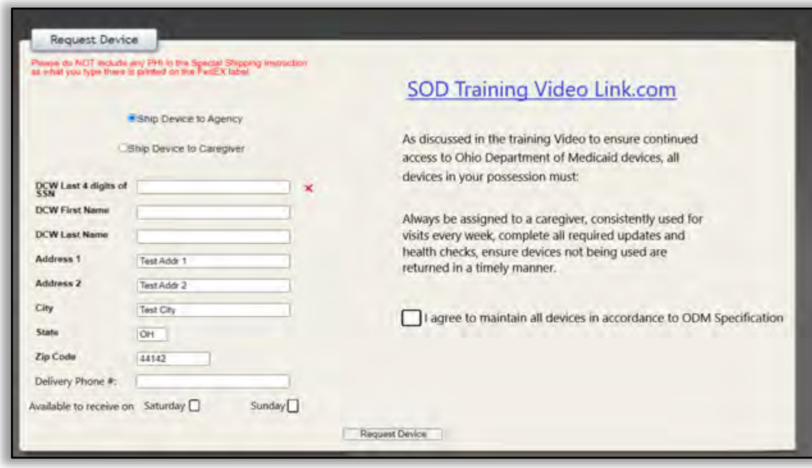
2. Watch the required video, then check **I have watched this video**, and select **Submit**.



3. Read and confirm each attestation.

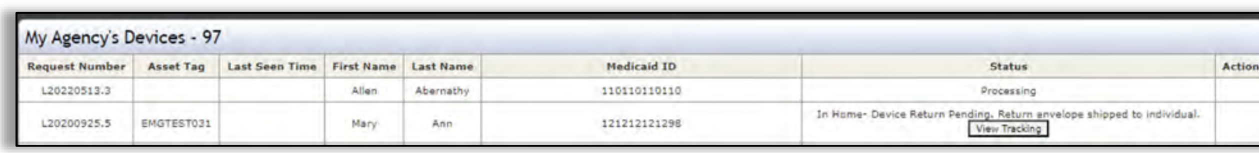


4. Complete DCW/Employee information and shipping details, then select **Request Device**.



Viewing Device Information

Select **List Devices** to display a list of EVV Devices that you have requested.



My Agency's Devices - 97

Request Number	Asset Tag	Last Seen Time	First Name	Last Name	Medicaid ID	Status	Action
L20220513.3			Allen	Abernathy	110110110110	Processing	
L20200925.5	EMGTEST031		Mary	Ann	121212121298	In Home- Device Return Pending. Return envelope shipped to individual. View Tracking	

Returning a Device

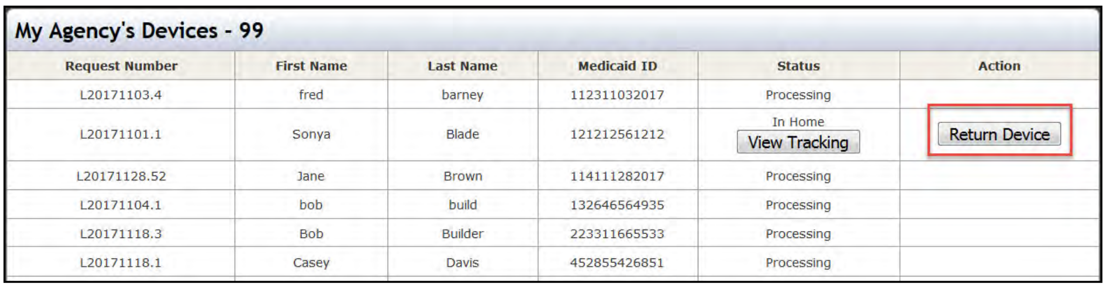
An EVV Device is to be returned using the eTRAC Portal only if:

- The Recipient is no longer receiving care from the agency provider.
- The Recipient has expired.
- The device is not needed, because the provider is using an alternate EVV system. The provider is using SMC, so the device is not needed.

Complete the following steps to return an EVV device.

1. Select **List Devices**.

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



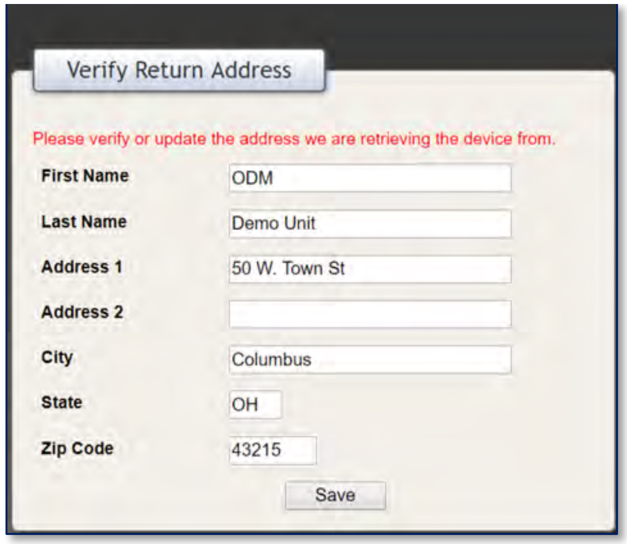
My Agency's Devices - 99

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	

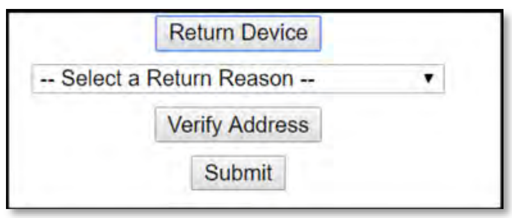
3. Select a **Return Reason** why the device is no longer to be used to record visits.

NOTE: The list is an example of 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 is listed, please call the EVV Provider Hotline.

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



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



8. Scheduling

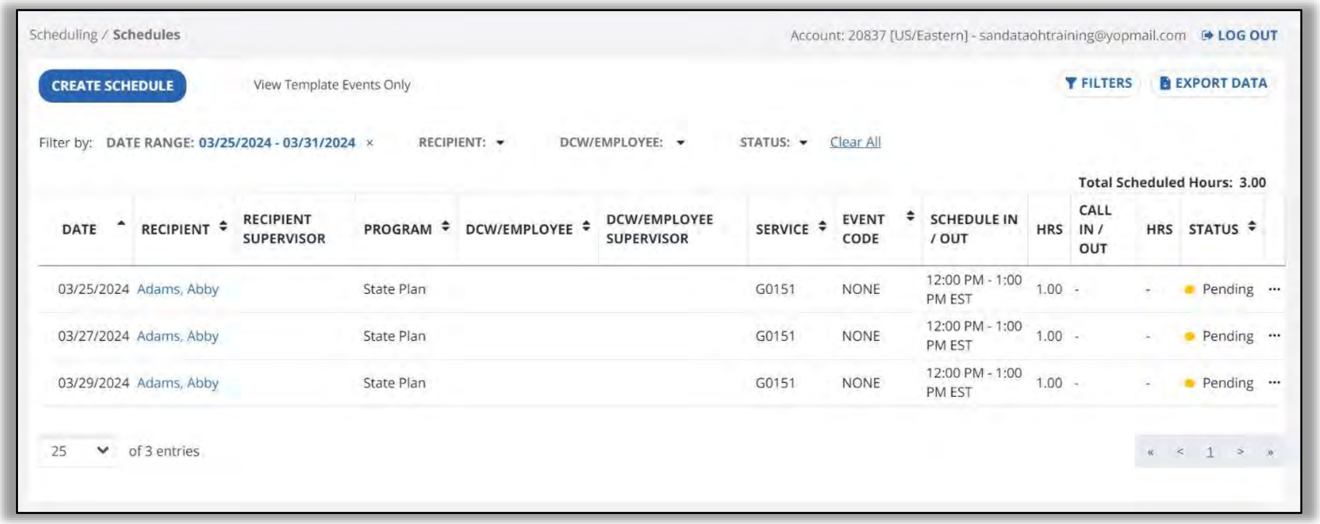
Module Objectives

- View schedules and use filters to update search results.
- Create a schedule.
- Create a permanent template.
- Modify an existing schedule.
    - Delete a schedule.
    - Mass edit multiple schedules.

Scheduling Overview

Use the Scheduling module to view visits that have been scheduled and to create new schedules. Scheduling is optional but it is an excellent tool to allow DCW or Employees to start a visit easily and quickly without searching for the Recipient. For agency providers, the schedule also helps the agency review the visit in visit maintenance to determine if service was provided as expected.

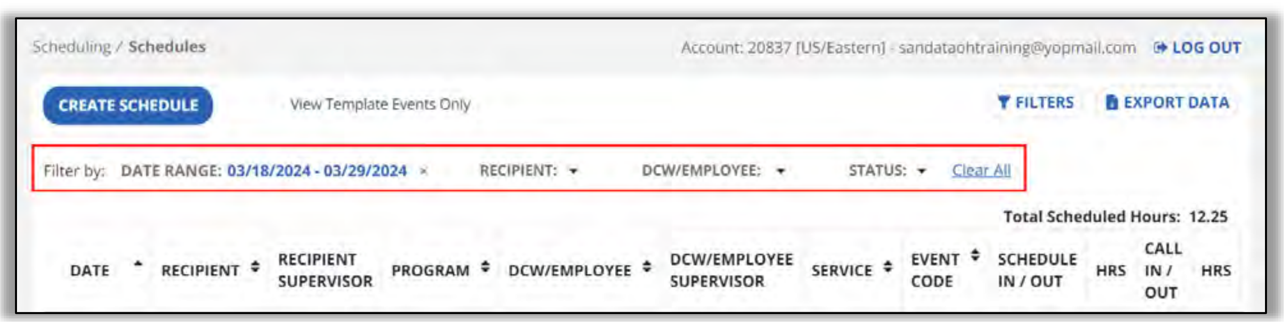
When scheduling screen loads, you will see the home page for schedules.



Searching for Schedules

There are two options to apply filters to the search results: quick filters or the Filters screen.

The quick filters are also default filters for the results. They can be quickly adjusted to modify the search results.



Use the Filters option on the right-side of the screen to locate specific visit information.

Schedule Filters

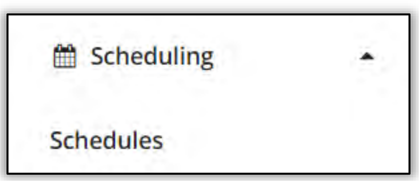
Item	Options
Recipient	Type 3 letters of the Recipient's first or last name, then select from the results.
Program	Select the recipient program.
From Date	Use the calendar icon or type in the date.
To Date	Use the calendar icon or type in the date.
From Time	Use the clock icon or type in the time.
To Time	Use the clock icon or type in the time.
DCW/Employee	Type 3 letters of the Recipient's first or last name, then select from the results.
Schedule Status	Pending, Confirmed, In Process, Closed, Hold, Cancelled
Exception	Visit Exception, Unknown Recipient, Unknown DCW/Employee, Unauthorized / Invalid Service, Missing Service, Visit Without In-Call, Visit Without Out-Call, Missing Location, Missing Medicaid ID, No Show, Late Call, Visit Without Any Calls
Supervisor (DCW/Employee or Recipient)	Select the Supervisor (DCW/Employee or Recipient) name from the drop-down menu.
Payer	Aetna, Amerihealth-Caritas, Anthem, Buckeye, Caresource, DODD, Humana, Molina, ODA, ODM, UHC
Position	HCA-TBD, HHA – Home Health Aide, LPN – Licensed Practical Nurse, OFC – Office Staff, PCA – TBC, RN – Registered Nurse

Item	Options
Service	All services for the OH program
Event Code	(No modifiers) Default (NONE), (No modifiers) U9 Modifier (U9)
Payer Number	Enter payer number.
Medicaid ID	Enter Recipient's Medicaid ID.
Authorization Number	Enter Authorization number.
EVV Call	Toggle button for schedules with EVV data
Schedules with no DCW/Employee assigned	Toggle button for schedules that do not have a DCW/Employee assigned
Hide Cancelled Schedules	Toggle button for schedules that have been cancelled. This option is defaulted as On.

Once you have selected filters, select **APPLY FILTERS**. You can also clear your filters and start again.

Creating a Schedule

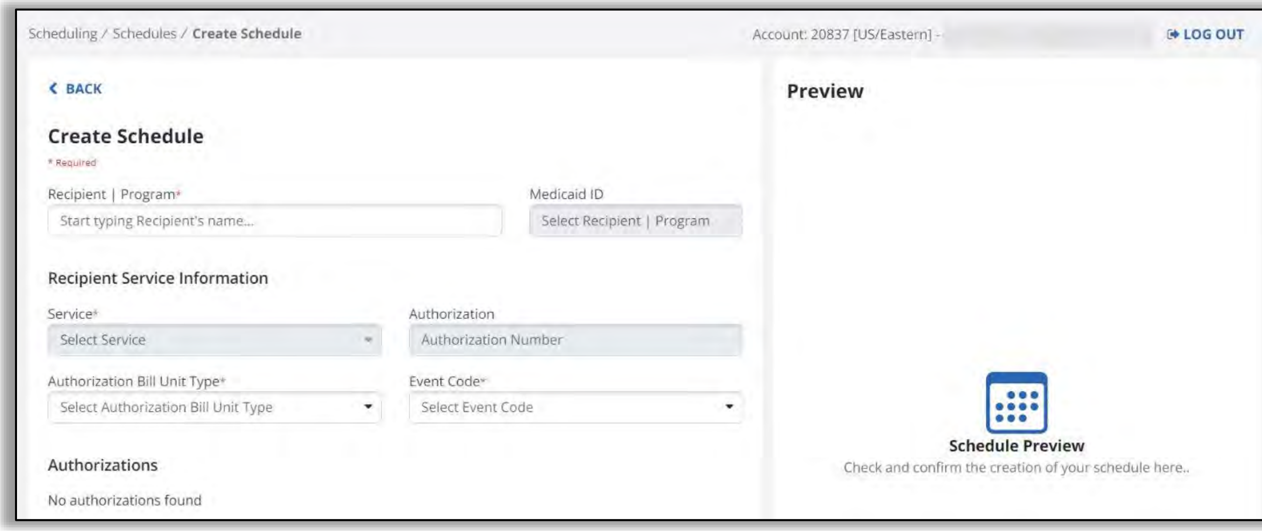
1. From the menu, select the arrow to expand Scheduling and select **Schedules.**



2. Select **Create Schedule.**

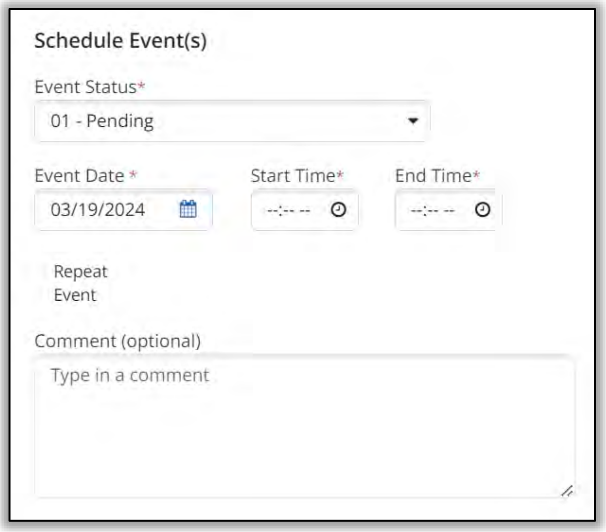
3. The Create Schedule screen appears on the right and the Preview on the left.

4. Complete the required fields.



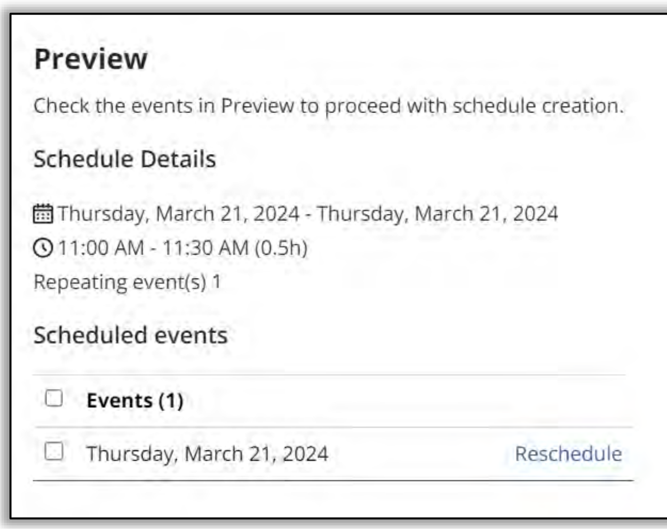
5. Under Select DCW/Employee, select the field, and start typing the DCW or Employee's name. Once found, select the name.

6. Under Schedule Event(s), complete the required fields.



7. Once all required fields have been completed, select **CREATE PREVIEW**. You can also **CANCEL** and start again.

8. On the right-hand side of the screen, the schedule will be displayed to verify schedule information prior to creating the schedule. A schedule has not been created until **SAVE** is selected.

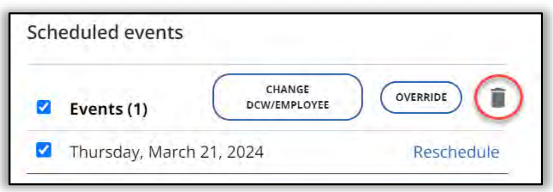


9. Select **SAVE** to confirm the schedule.

Editing a Schedule in Preview

1. In the preview screen, changes can be made prior to committing to the schedule. Select the check box in front of the schedule(s) for additional options to modify the proposed schedule. You have the option to delete the proposed schedule, make changes, and preview the schedule.

2. Once the schedule(s) have been selected, select the **trash can** icon to delete the proposed schedule. A pop-up box will appear to confirm the decision to delete the proposed schedule. Select **OK**.



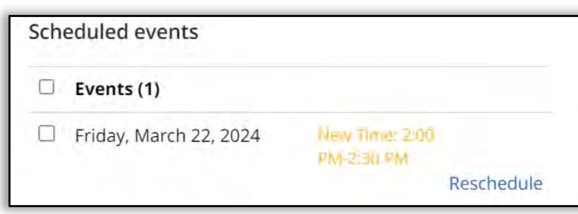
3. Adjust the details in the Create Schedule section and select **Create Preview** to view the results. Select **SAVE** to confirm the schedule.

When previewing the proposed schedule, if a schedule has a conflict, these need to be resolved. The system will alert you to the conflict to make changes.

4. Select the down arrow to expand the conflict for viewing.

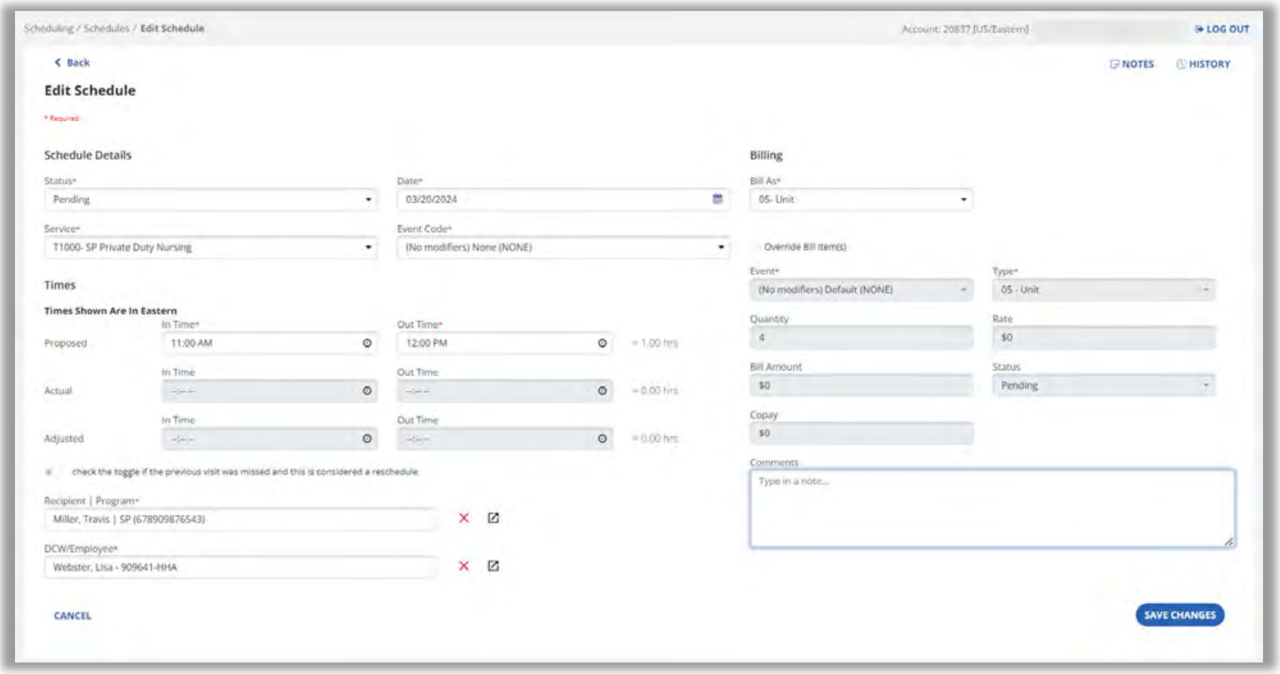
5. Select **Resolve**. A pop-up box will appear to update the schedule to resolve the conflict. Adjust the proposed schedule as needed to resolve the conflict.

6. The changes are noted in the schedule. If these changes are appropriate, select **Save**.



Modifying a Schedule

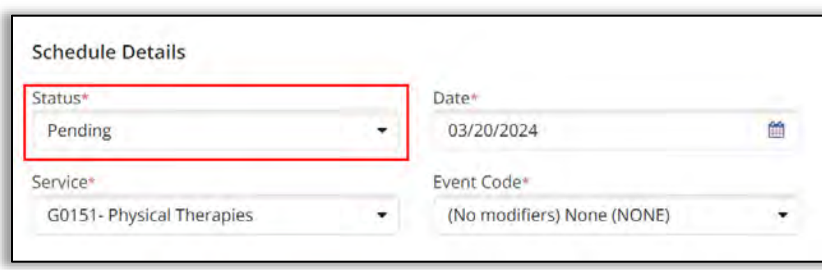
Once a schedule has been created, there are several fields that can be edited to adjust the schedule.



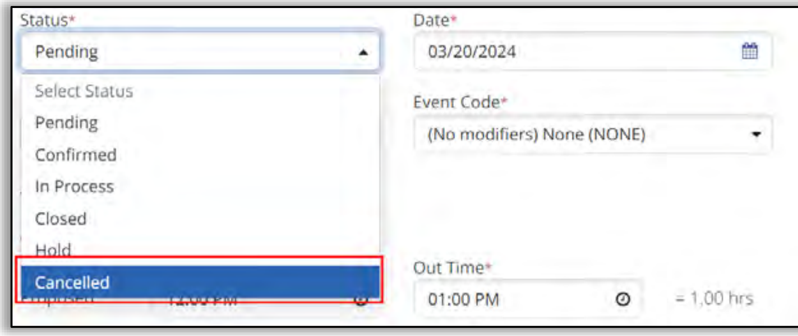
Deleting a Schedule

Once a schedule has been created, it cannot be removed from the system; however, it can be cancelled. The status of the schedule will need to be modified to Cancelled.

1. Select the schedule to edit. Under the Schedule Details, update the **Status**.



2. From the Status drop down menu options, select **Cancelled**.



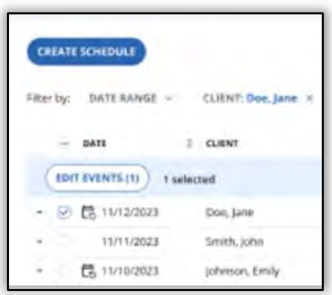
3. Select **SAVE CHANGES** to confirm the schedule has been cancelled.

4. The **Reason for change** pop-up box will appear as any changes to a schedule require a reason code for the change.

5. Select the appropriate Cancel Reason from the drop-down menu. (Optional) Make any comments regarding the cancellation in the Note section.

6. Select **SAVE CHANGES** to confirm the schedule has been cancelled.

NOTE: To select more than one schedule and edit, select the checkbox next to each schedule. Then follow the steps to Modify or Cancel a Schedule.



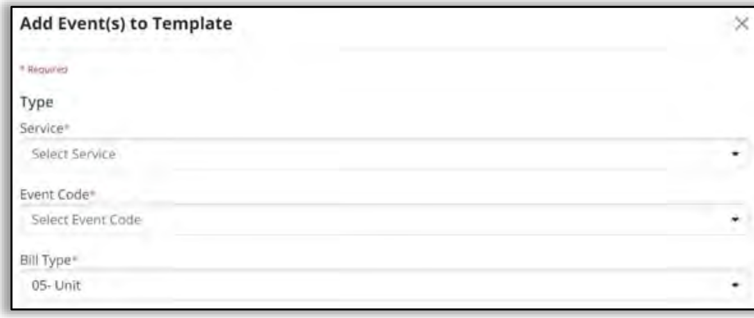
Recurring Schedules

Recipients who will be receiving services for an extended period can have Recurring Schedules created for them. This saves time by preventing you from having to schedule a recipient every time they need to receive service. The Templates tab allows you to schedule each day of the week by time and by DCW/Employee.

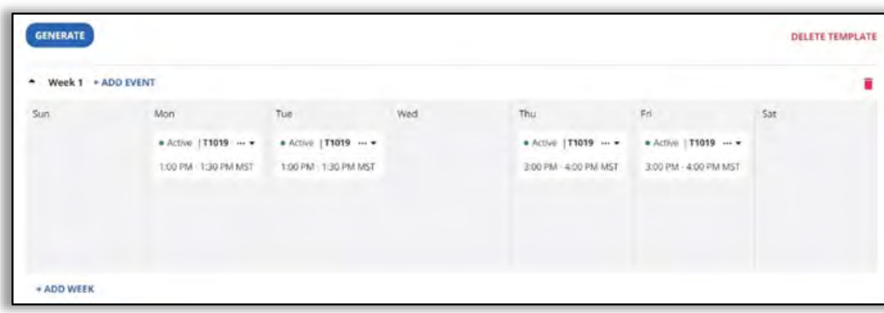
1. Locate your recipient and open their profile.
2. Select the Schedules tab.

3. Select **CREATE TEMPLATE**.

4. Complete all required fields, then select **ADD EVENT.**



5. Continue to Add or Edit schedule templates until all templates are complete for this client.



NOTE: Be sure the template is under the correct day of the week column. For example, if a template is created under the Tuesday column, when the schedules are generated, that template creates schedules on Tuesdays.

6. Select **GENERATE** to create schedules for this client to match the Recurring Schedule Templates. Schedules are created from today through the Generate Through Date (next to the Generate button).

9. Visit Capture

Module Objectives

- Log on and record a visit using Sandata Mobile Connect (SMC).
- Locate and utilize the Call Reference Guide (CRG) and Service ID List for your account.

Sandata Mobile Connect

Sandata Mobile Connect (SMC) is the mobile visit verification app installed on a provided EVV Device or downloadable onto a smartphone or tablet device. For the Ohio EVV Program, SMC is the primary and preferred method of calling in and out for Recipient visits.

> **NOTE:** A DCW or Employee can start a visit using SMC and complete the visit using Telephony and vice versa, if necessary.

Sandata Mobile Connect Credentials

SMC user credentials for DCW or Employees are generated when the DCW or Employee is created as a DCW/Employee in Sandata EVV. For independent providers, SMC credentials are included in the Welcome Kit Letter.

When an agency provider creates a DCW/Employee, the following information must be specified in the DCW/Employee profile for Sandata EVV to create SMC login credentials.

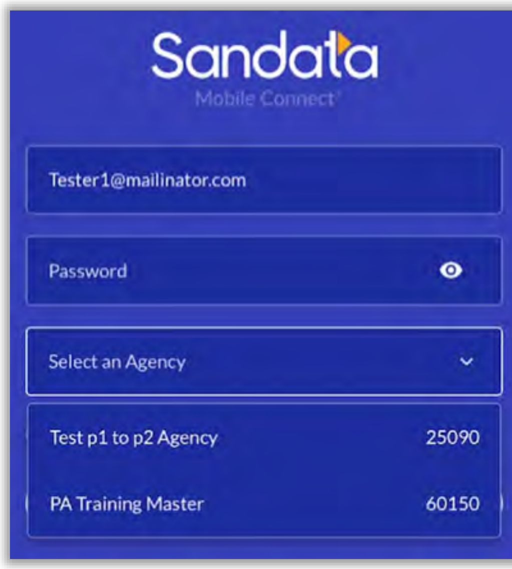
- First and last name.
- Valid email address in the Addresses and Phone Numbers section.
- Social Security Number.
- Check the **Mobile User** checkbox in the Identifiers section.

When these values are captured and the DCW/Employee record is saved, Sandata EVV generates a temporary SMC password and emails it to the DCW or Employee at the email address entered. If the temporary password expires, the agency EVV security administrator can reset the mobile password.

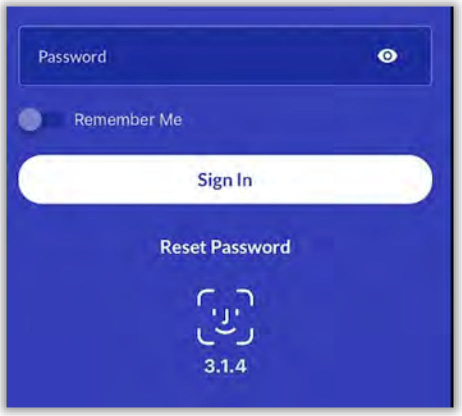
Sandata Mobile Connect Log In

1. If using a personal smart device, download the Sandata Mobile Connect application from the app store associated with your smart device.

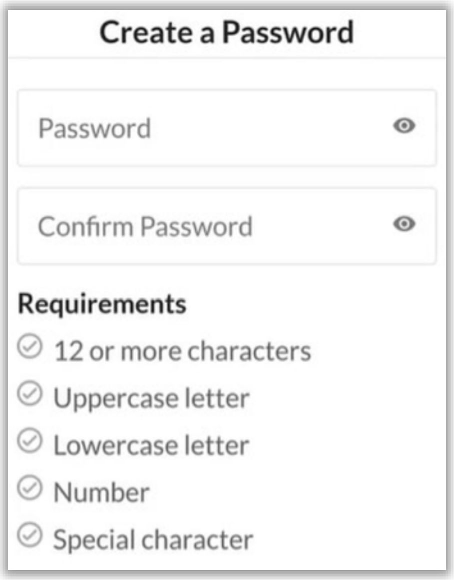
2. In the Username field, enter your email address. If the DCW or Employee has access to multiple agencies, then a drop-down menu option will appear to select an agency.



3. Enter the password from the temporary password email.



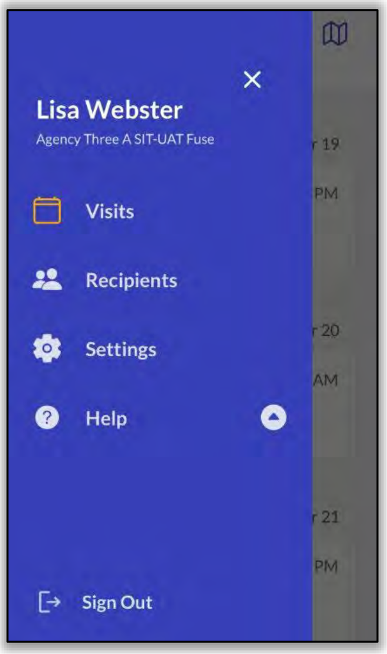
4. Create a new password.



Sandata Mobile Connect Navigation

Upon successfully logging in to SMC, the Home screen displays. The user can tap the **Menu** icon in the upper-left corner of the screen to access:

- **Visits** – to view upcoming visits, start a scheduled visit or to see completed past visits.
- **Recipients** – to perform a Recipient search or start an unknown visit.
- **Settings** – to change language preference and password. All other options on the settings screen are disabled.
- **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.

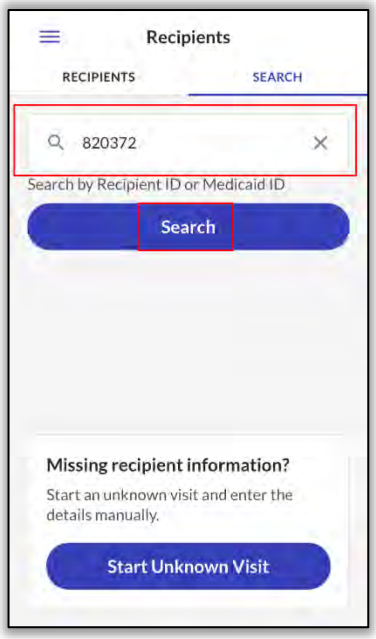


Starting an Unscheduled Sandata Mobile Connect Visit

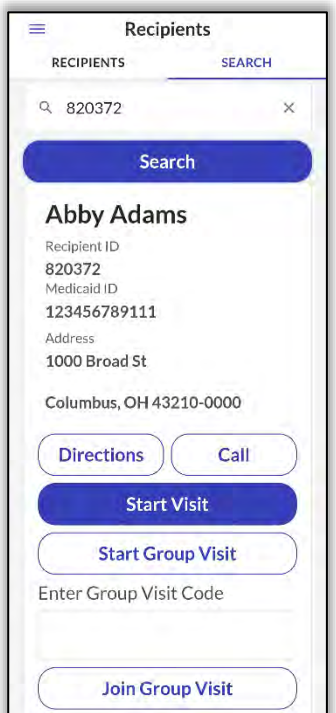
1. Log in to SMC.
2. Tap in the **SEARCH** field and enter the 12-digit Medicaid ID or EVV system generated 6-digit Recipient ID of the Recipient.

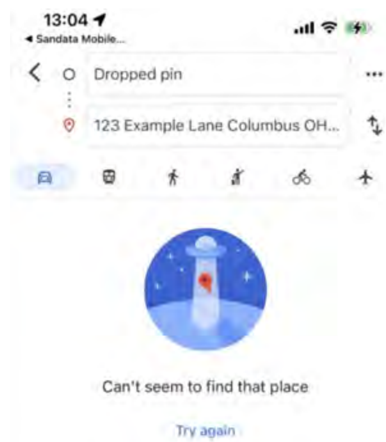
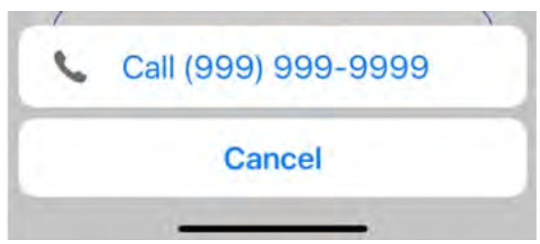
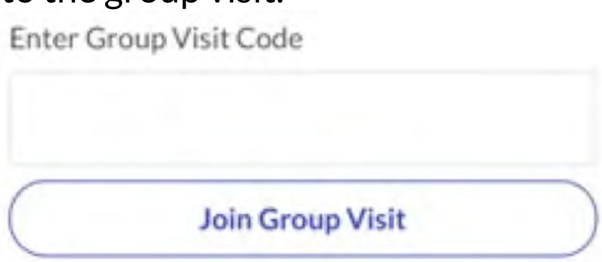
   NOTE: If the Medicaid ID entered is not found, the DCW or Employee can still call-in and out by starting an unknown visit. This is covered later in the document.

3. Tap the **Search** button. If the ID entered does not match to any Recipient, a “No results found” message displays.

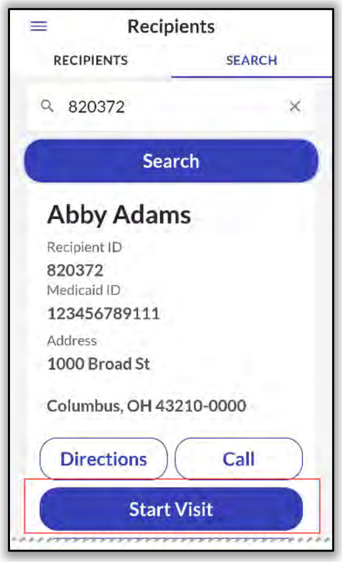


4. If a matching Recipient record is found, the record will display with several options.



Convention	Description
Directions	Open directions from the DCW or Employee’s current location to the address listed in the Recipient record. 
Call	Place a phone call to the phone number listed in the Recipient record. This is **not** recording a visit. 
Start Visit	Start a visit. 
Start Group Visit	Start a group visit. 
Enter Group Visit Code / Join Group Visit	Join an existing group visit using the 6-digit number assigned to the group visit. 

5. Tap **Start Visit**.

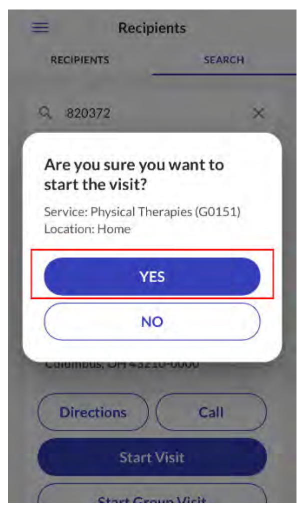


6. Select the Service from the drop-down list, then tap **Continue.**

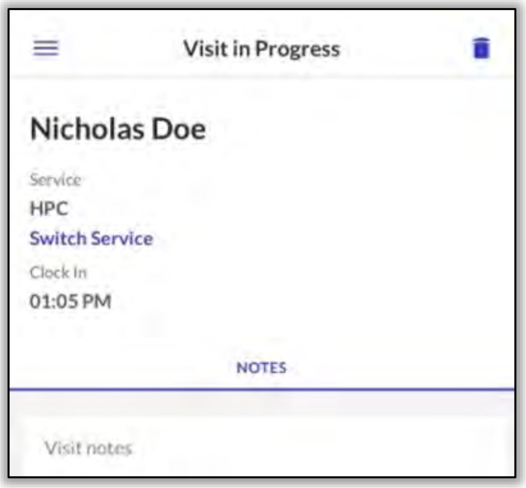
   NOTE: The service drop-down list is based upon the Recipient record. If all payers and programs display, it means the Recipient record does not have a defined service.

7. Select the location where services begin. Tap **Home** or **Community** and then tap **Continue**.

8. A pop-up screen appears asking the user to confirm the start of the visit. Tap **YES**.

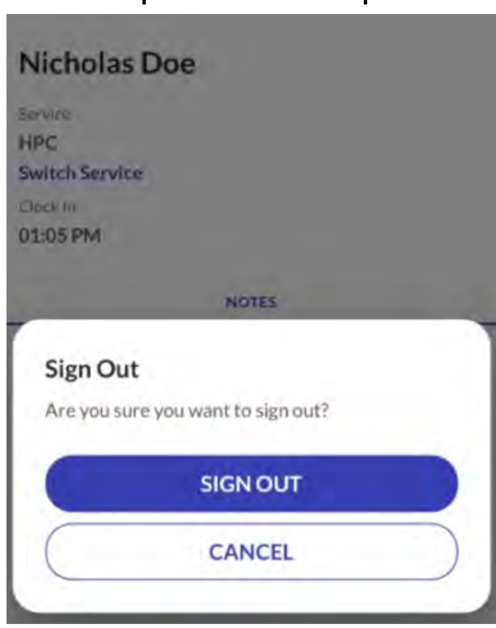


9. The visit is now in progress, and SMC will continue to log hours worked while the user is signed out.



NOTE: The Abandon Visit button (trash can icon) 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 DCW or Employee forgot to call out. An abandoned visit appears in Sandata EVV as an incomplete visit and must be updated or corrected in Visit Maintenance.

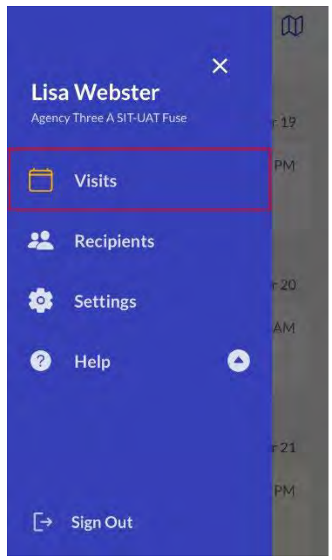
10. Tap **SIGN OUT** and proceed with providing care.



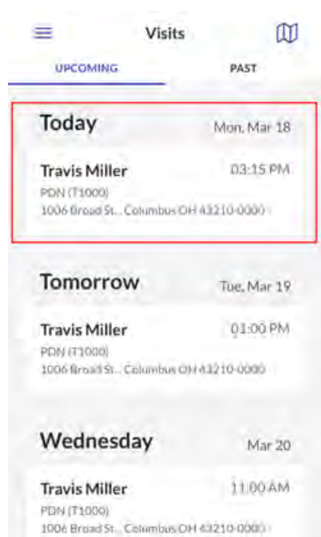
Starting a Scheduled Sandata Mobile Connect Visit

A schedule can be created in Sandata EVV and will appear under the Visits tab. The DCW or Employee does not need to search for the Recipient and can start the visit from the schedule.

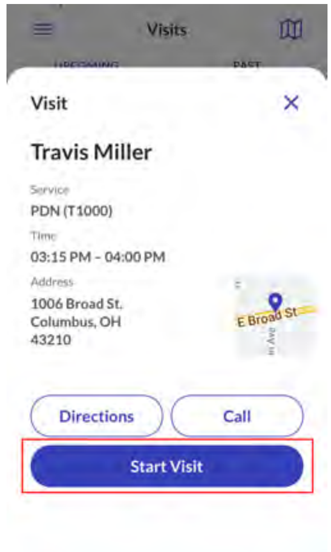
1. Locate the EVV Device or the DCW or Employee's personal device.
2. Log in to SMC.
3. Tap **Visits**.



4. Tap the Recipient's schedule to start the visit for today. The scheduled visits are displayed; however, you can only start the visit for the current date.

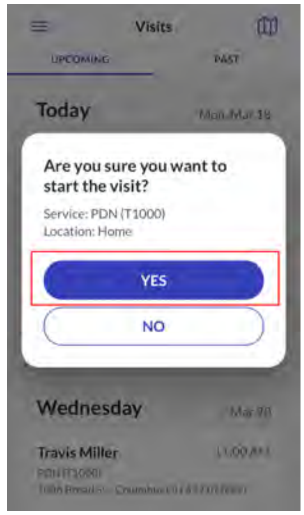


5. A pop displays to confirm the visit details. Tap **Start Visit**.



6. Select the location where services will be starting. Tap **Home** or **Community** and then tap **Continue**.

7. A pop-up display asks the DCW or Employee to confirm the start of visit. Tap **YES.**

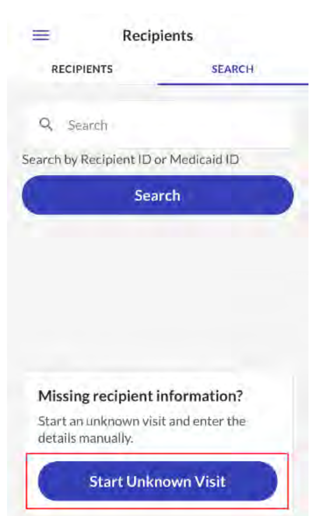


8. Log out of SMC. The visit is completed following the same process used when completing a visit for an unscheduled visit.

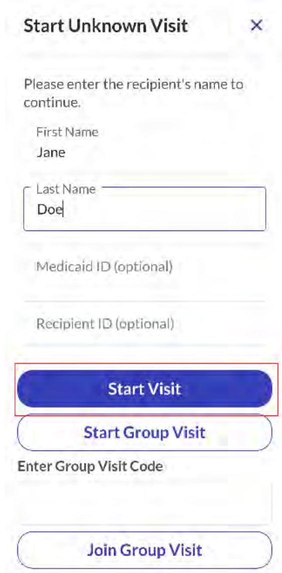
Starting an Unknown Sandata Mobile Connect Visit

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

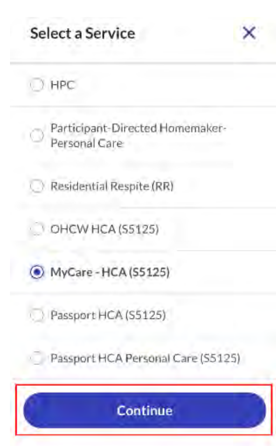
1. Locate the EVV Device or the DCW or Employee's personal device.
2. Log in to SMC.
3. Tap **Start Unknown Visit**.



4. Enter the following information for the Recipient. 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** Number. (Optional – if available)

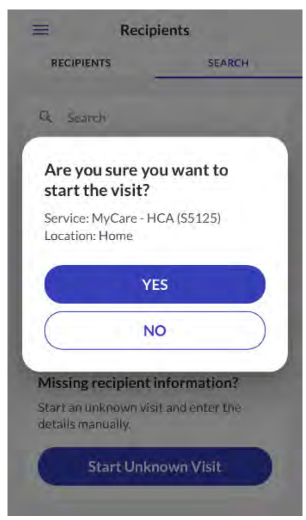


5. Tap **Start Visit**.
6. Select the Service from the drop-down list, then tap **Continue.**



7. Select the starting location. Tap **Home** or **Community** and then tap **Continue**.

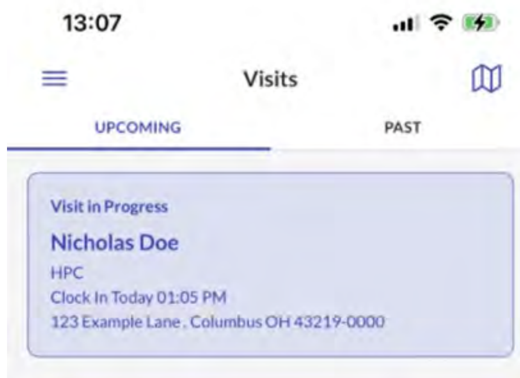
8. A pop-up display asks the DCW or Employee to confirm the start of visit. Tap **YES.**



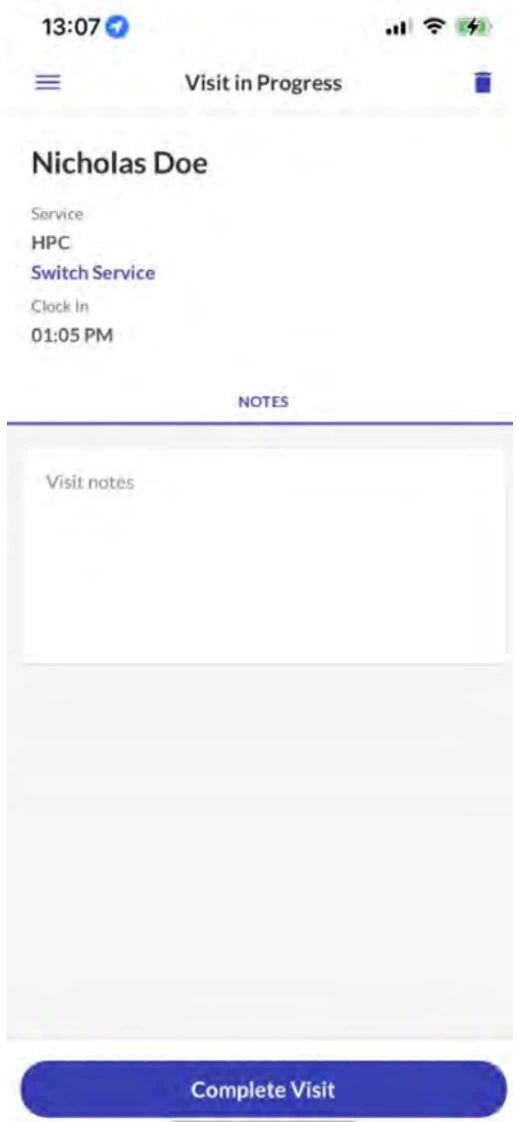
9. Log out of SMC. The visit is completed following the same process used when completing a visit for a known Recipient.

Completing a Sandata Mobile Connect Visit

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



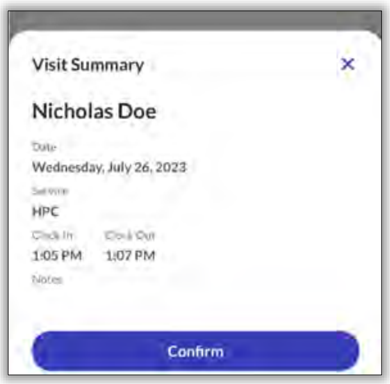
2. The Visit Note screen displays. Enter notes if applicable, then tap **Complete Visit**.



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

3. Select the ending location. Tap **Home** or **Community** and then tap **Continue**.

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

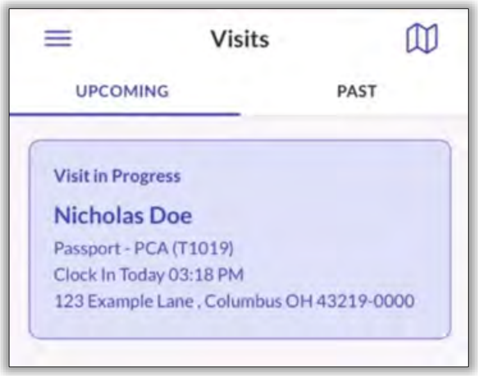


The visit is successfully submitted.

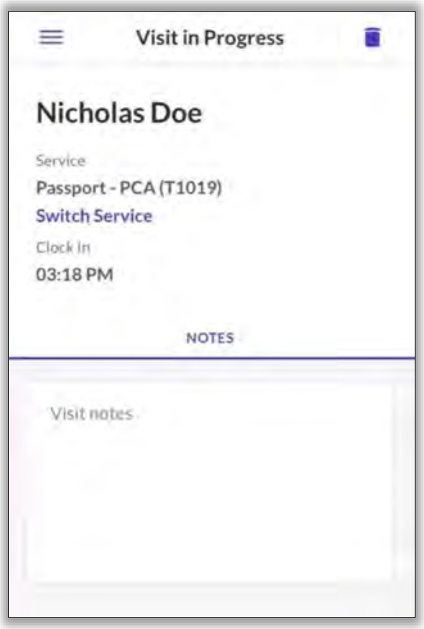
Switching Services

The call-in process does not change. Log into SMC, search for the Recipient, select the initial service, then tap **Start Visit**. When you are ready to switch services:

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



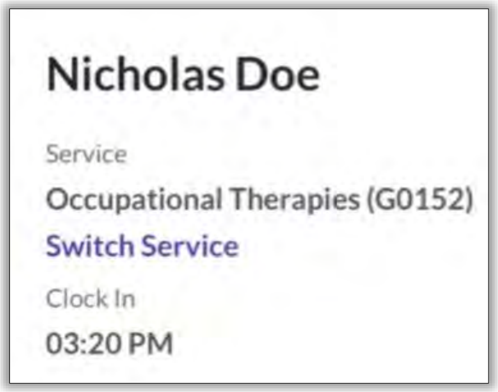
2. Enter Visit Notes if applicable, then tap **Switch Service**.



3. Select the Service from the drop-down list, then tap **Continue**.

4. A popup appears, tap **YES.**

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



Telephonic Visit Verification

Telephonic Visit Verification (TVV) is available as an alternative to the mobile call-in and call-out process. TVV should be used 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.).

When using TVV, DCW or Employee can call-in/call-out from any phone, including the Recipient’s home phone, call phone, or DCW or Employee’s cell phone.

Telephonic Visit Verification Documentation

Two documents are required to record a TVV visit. Both documents are housed in eTRAC, at https://etraconline.net/.

1. Service ID List – contains the 3-digit numbers that correspond to each EVV service.

Ohio Service List

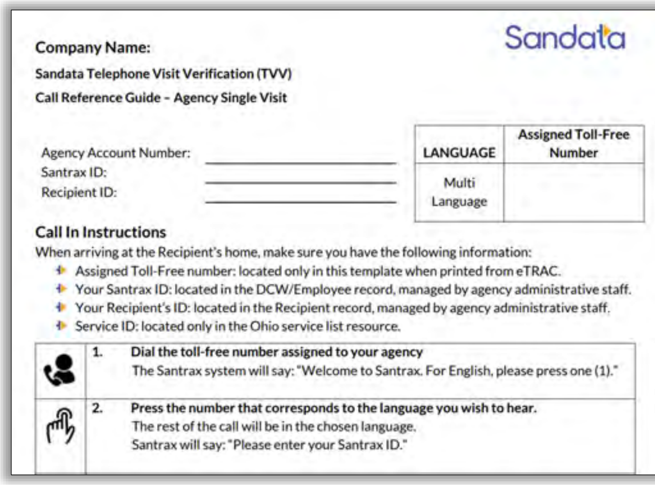
Sandata

Write your Santrax ID above for easy reference

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

Service ID	Description	Service ID	Description
Passport		Level One, Individual Options, and Self Waiver	
515	Passport Waiver Nursing RN	535	IO Waiver Nursing RN
616	Passport Waiver Nursing LPN	636	IO Waiver Nursing LPN
717	Passport Home Care Attendant Nursing	838	Homemaker or Personal Care
727	Passport Waiver Choices HCAS (T2025)	842	Participant-Directed Homemaker-Personal Care
747	Passport Consumer Directed Personal Care (T1019)	927	Nursing Delegation RN
777	Passport Home Care Attendant Personal Care	928	Nursing Delegation RN Per Visit
818	Passport Personal Care	929	Nursing Delegation LPN
931	Passport Enhanced Community Living	930	Residential Respite

2. Call Reference Guide – contains the phone number associated with your EVV account, and a transcript of the call in and call out processes. Each provider will have a unique Call Reference Guide. Santrax TVV prompts callers up to 3 times to input information. Two or more calls made within 1 minute of another will make 1 of the calls extraneous.



Company Name:

Sandata Telephone Visit Verification (TVV)

Call Reference Guide - Agency Single Visit

Agency Account Number: __________

Santrax ID: __________

Recipient ID: __________

LANGUAGE	Assigned Toll-Free Number
Multi Language	

Call In Instructions

When arriving at the Recipient's home, make sure you have the following information:

- Assigned Toll-Free number: located only in this template when printed from eTRAC.
- Your Santrax ID: located in the DCW/Employee record, managed by agency administrative staff.
- Your Recipient's ID: located in the Recipient record, managed by agency administrative staff.
- Service ID: located only in the Ohio service list resource.

	1.	**Dial the toll-free number assigned to your agency** The Santrax system will say: "Welcome to Santrax. For English, please press one (1)."
	2.	**Press the number that corresponds to the language you wish to hear.** The rest of the call will be in the chosen language. Santrax will say: "Please enter your Santrax ID."

Visit Scenarios (Sandata Mobile Connect and Telephonic Visit Verification)

Multiple Recipients in the same home

- SMC – the DCW or Employee calls in and out for each Recipient receiving care at that time.
- TVV – the DCW or Employee calls in and out, entering the Recipient ID of the Recipient receiving care at that time.

  NOTE: Look up the Recipient ID in the Recipient's record in the Sandata EVV Recipient Management module or run an Active Recipients Report in the Reports module.

The provider provides care multiple times for a single Recipient in one day.

- SMC – the DCW or Employee calls in and out for each visit, capturing the visit hours and service performed.

- TVV – the DCW or Employee calls in and out for each visit, capturing the visit hours and service performed.

Group Visits

- SMC – The DCW or Employee uses the group visit functionality (see Chapter 9) to do 1 call-in and call-out for all the Recipients in the visit.
- TVV – The DCW or Employee uses the group visit functionality (see Chapter 9) to do 1 call-in and call-out for all the Recipients on the visit.

Overnight Visits

- SMC – the DCW or Employee will call in upon arriving and call out when leaving.
- TVV – the DCW or Employee will call in upon arriving and call out when leaving.

10. Visit Maintenance

Module Objectives

- Use the Sandata EVV dashboard to monitor current day visit exceptions.
- Search and review visit information.
- Resolve visit exceptions.

Key Terminology

Term/Acronym	Definition
Recipient	A person who receives services through the Medicaid program, known in Ohio as a Medicaid Member
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
DCW/Employee	Director Care Worker or Employee: A person who is employed by an agency provider to provide care to one or more Recipients
Reason Code	An attestation that supporting documentation is being maintained
Visit	The electronic service provided during an in-person encounter to a Recipient in a home or community-based setting
Visit Maintenance	The module within Sandata EVV where visits exceptions can be corrected and/or acknowledged

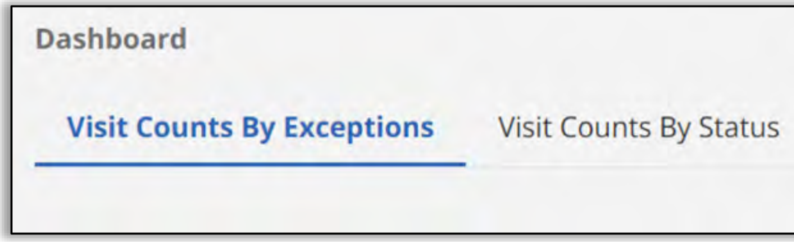
Visit Maintenance Introduction

The Sandata EVV dashboard and visit maintenance modules are designed to give users the ability to review, modify, and correct Sandata EVV visits. Exceptions are applied based on the program rules for the specific exception. Visit Maintenance allows you to correct/acknowledge these exceptions, to achieve a verified status. Only visits that are in a verified status will be eligible to be matched with a claim.

> **NOTE:** It is not recommended that changes be made to a visit that is still in process within Visit Maintenance.

Sandata Dashboard

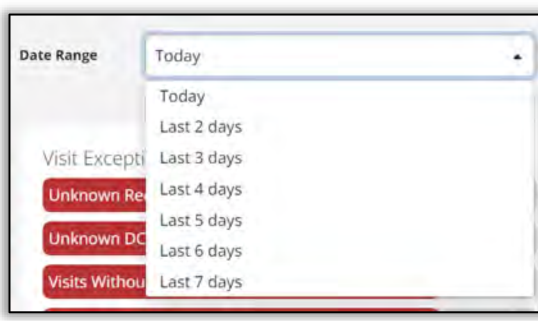
The EVV Dashboard is designed for agencies to monitor visit activity in near-real time. This can help you identify and address visit capture issues quickly. The Dashboard is split into two sections, exceptions and visit statuses.



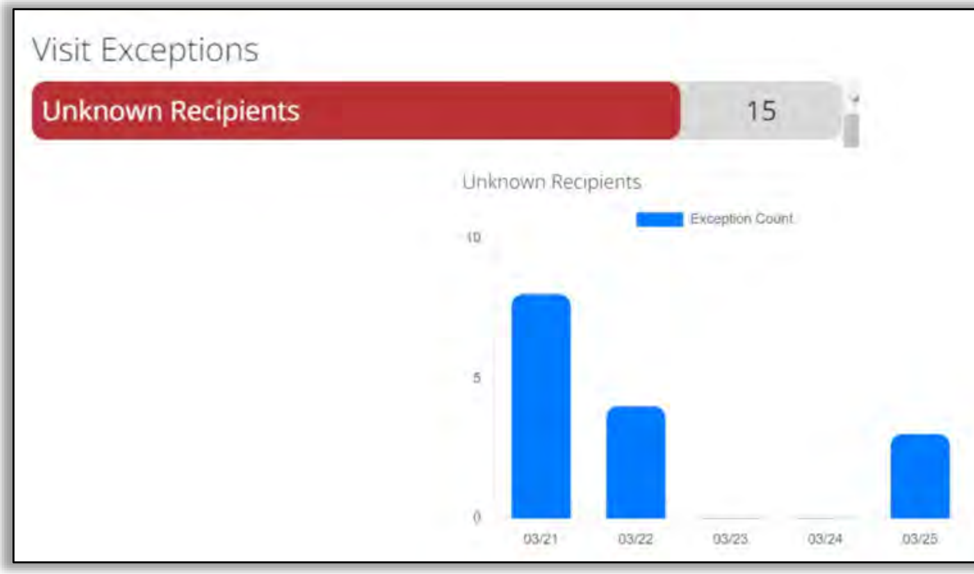
Dashboard Exceptions

The Exceptions tab displays a running count of exceptions for a defined date range.

Using the Date Range tool, you can select 1 – 7 days of previous visits.

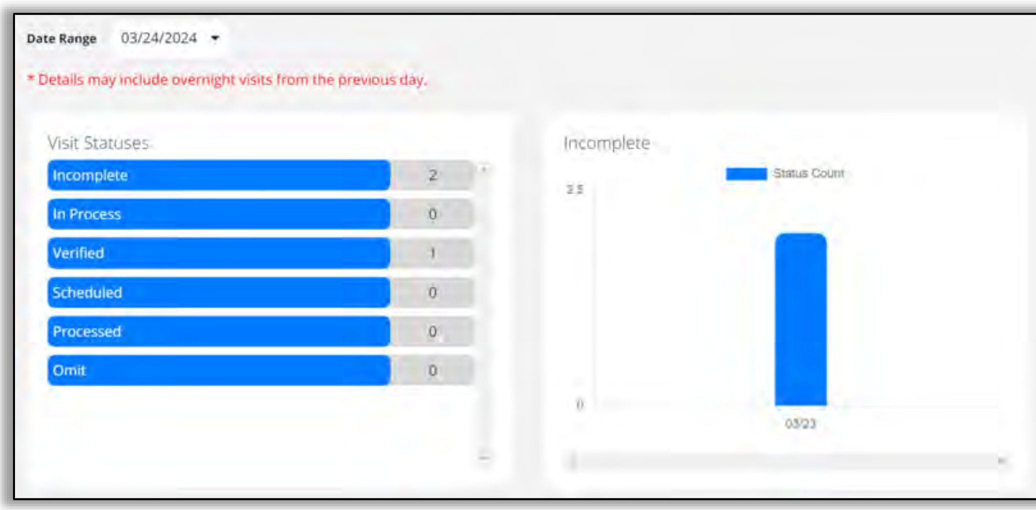


Select the exception category to view statistics for the defined date range.

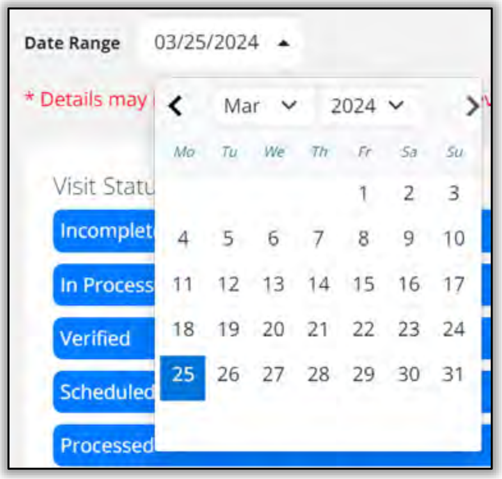


Dashboard Visit Statuses

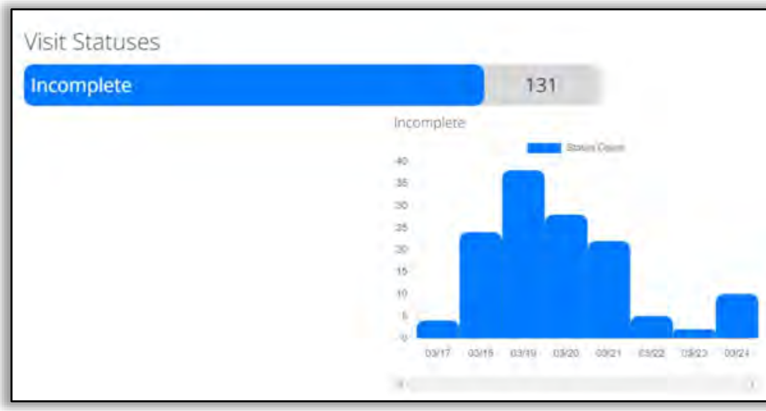
The Visit Statuses tab displays a running count of visit statuses for a defined date range.



Using the Date Range tool, you can select a range of up to 31 days.



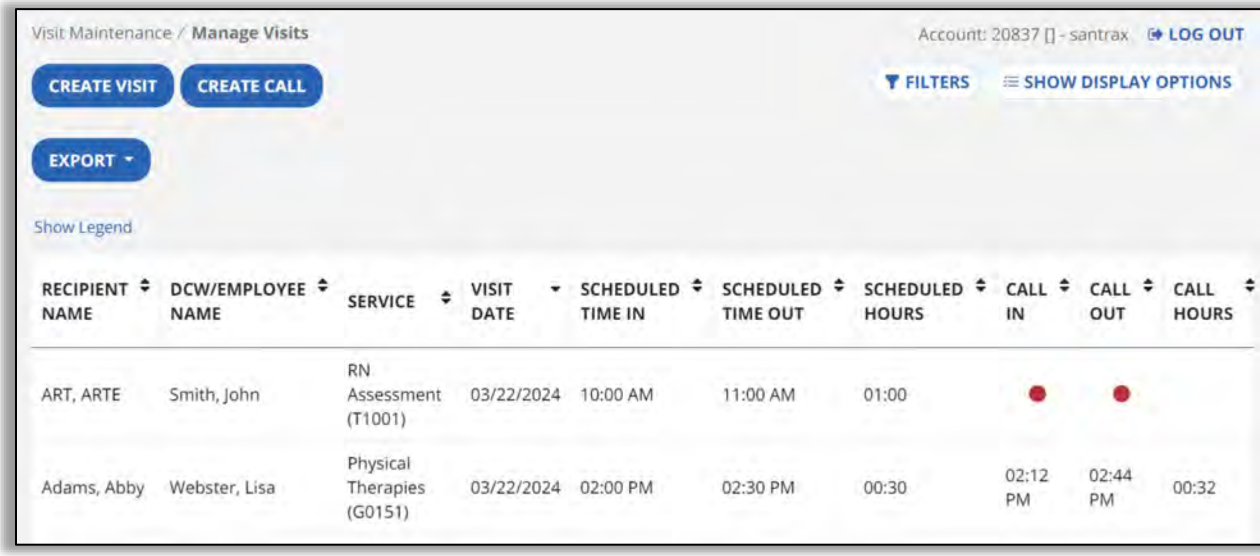
Select the visit status category to view statistics for the defined date range.



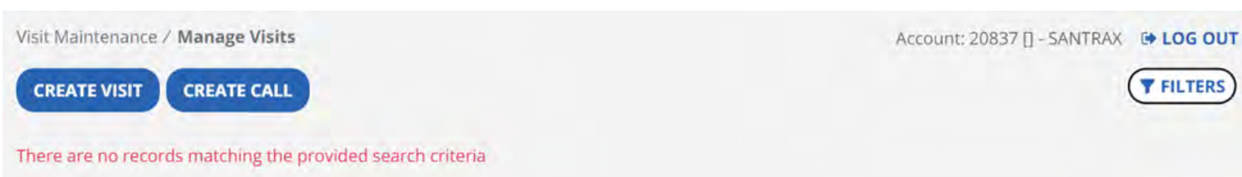
Visit Maintenance Overview

Use Visit Maintenance to view visit information and make corrections to visit data. Visit Maintenance should be accessed frequently to ensure the correct visit information is being recorded and maintained.

When the Visit Maintenance screen loads, you will see the current day's visits. Any missing or inaccurate information will be marked with an exception indicator.



If you have no recorded visits for the day, this section will appear blank.



Searching for a Visit in Visit Maintenance

Use the FILTERS option on the right-side of the screen to locate specific visit information.

Visit Maintenance Filters

Filters are available to help you navigate and locate specific visits. None of the filters are required; you can complete as many or as few as you need. The From Date and To Date are the most important fields in loading your visit data. For example, if you provide care to a single Recipient, you do not need to enter the Recipient's name.

Item	Options
From Date	Use the calendar icon or type in the date.
To Date	Use the calendar icon or type in the date.
Recipient	Enter using the format: Last Name, First Name.
DCW/Employee	Enter using the format: Last Name, First Name.
Payer	Aetna, Amerihealth-Caritas, Anthem, Buckeye, CareSource, DODD, Humana, Molina, ODA, ODM, UHC
Program	Select the Recipient program.
Service	All services for the Ohio program
Category	This field does not apply to the Ohio program. Please use the Payer field.
Visit Status	In Process, Incomplete, Omit, Processed, Scheduled, Verified
Recipient Medicaid ID	Enter a 12-digit Medicaid ID number.
Filter Visits By	All Visits, All Exceptions, Exception Types
Exception Types	Visit Exception, Unknown Recipient, Unknown DCW/Employee, Unauthorized / Invalid Service, Missing Service, Visit Without In-Call, Visit Without Out-Call, Missing Location, Missing Medicaid ID, No Show, Late Call, Visit Without Any Calls NOTE: This field is only available when "Filter Visits By > All Exceptions" is selected.
Call Type	Manual, Mobile Visit Verification (MVV)

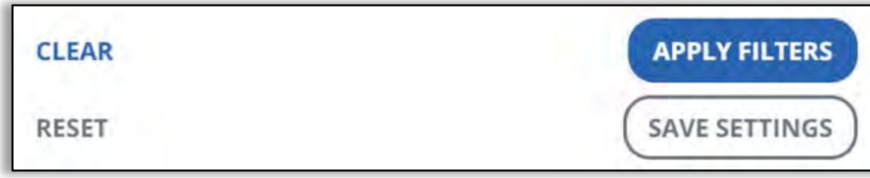
Item	Options
DCW/Employee Other ID	Enter other ID.
Supervisors	This field currently does not apply to the Ohio program.
Department	This field currently does not apply to the Ohio program.
Group Visit Code	If the date range specified in the search filters is 7 days or less, the field will display a drop-down list. If the date range specified in the search filters is greater than 7 days, the group visit code will need to be typed into the field.

NOTE: Some of the filters are dependent. For example, when you select a payer, that selection limits the program options. You can clear your filters at any time.

There are 6 different statuses that represent the distinct stages of a visit.

Visit Status	Description
In Process	The visit has been started, but not completed.
Incomplete	The visit has exceeded 24 hours and still contains missing or inaccurate information.
Omit	The visit has been marked “do not bill.”
Processed	The visit has been matched to a claim.
Scheduled	The visit has been scheduled but has not yet started.
Verified	All exceptions have been cleared and the visit is available for claims matching.

Once you have selected filters, select **APPLY FILTERS**. Select **CLEAR** to clear your filters and start again.



To save the filter options you have selected for future logins, select **SAVE SETTINGS**. To clear the settings you have saved previously, select **RESET**.

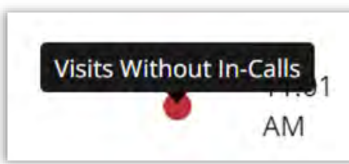
Search Results – Understanding the Visit Grid

When the filters are applied and a search is performed, the results are displayed in the visit grid.

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS
Mosley, Sara	Smith, Sarah	RN Assessment (T1001)	03/25/2024	08:00 AM	09:00 AM	01:00			
AB, ABBY	NEWEMP, EMPLOYEE	SPHH Nsg - LPN (G0300)	03/25/2024				08:00 AM	10:00 AM	02:00
ART, ARTE	Adams, John	RN Assessment (T1001)	03/25/2024				11:38 AM	11:50 AM	00:12
ART, ARTE	Tubman, Harriet	RN Assessment (T1001)	03/25/2024				07:00 AM	08:00 AM	01:00

Each row is a visit, and each column is a piece of visit data. Select **SHOW DISPLAY OPTIONS** to customize your view.

Hover over an exception indicator to see the name of the exception.



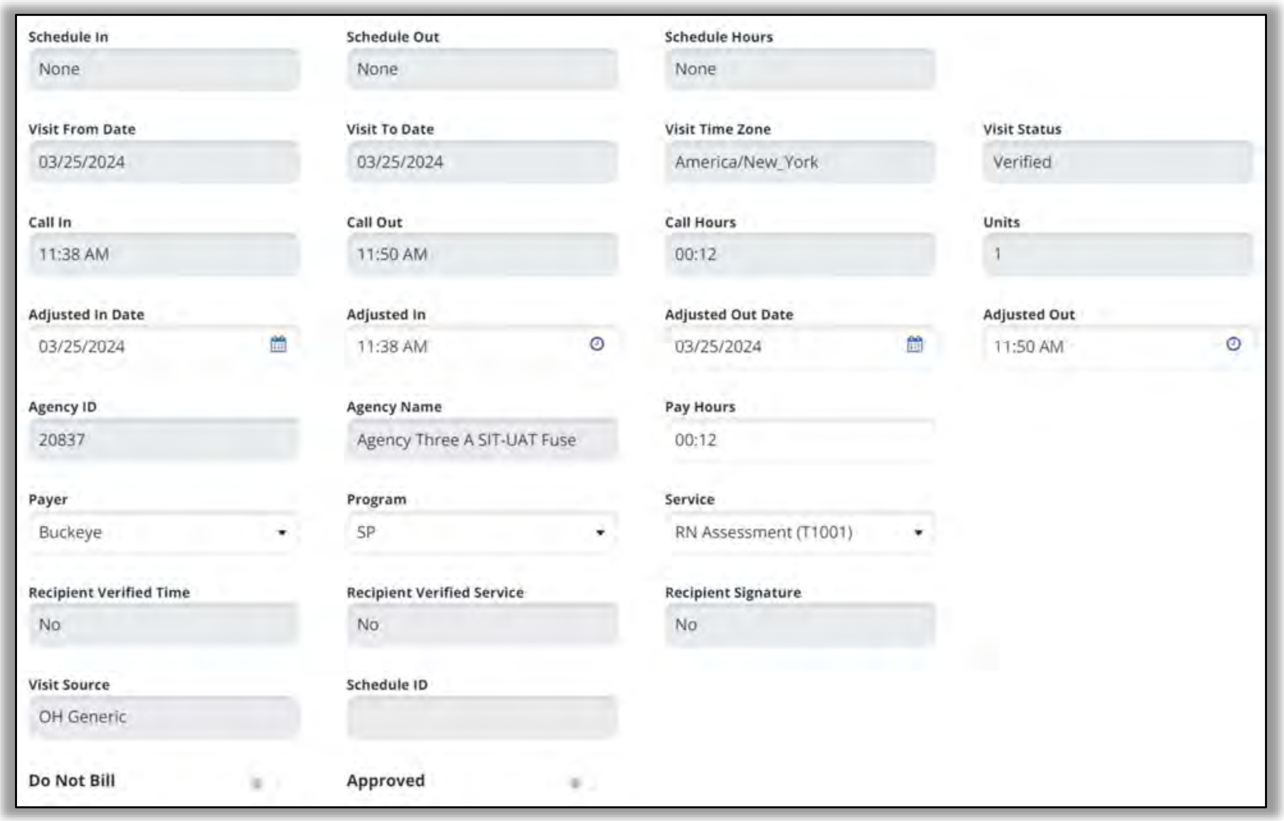
Understanding the Visit Details Screen

To view the details of a visit, select the visit line. When selecting a data element on the visit line, the Visit Details screen opens directly to that section of the visit.

General

The General tab is a summary of the details captured at the point of care. In the General tab, you can:

- Add an adjusted call date.
- Add an adjusted call time.
- Change the payer, program, or service on the visit.



Recipient

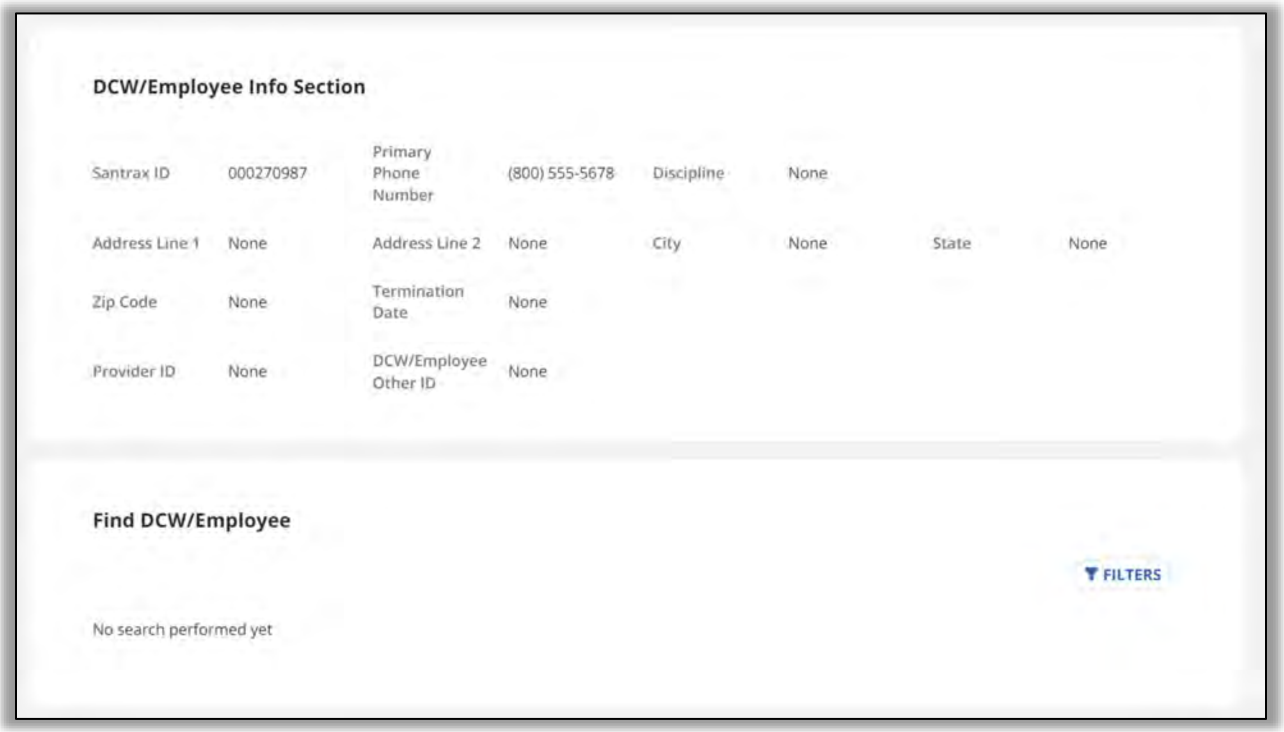
The Recipient tab contains the contact information and address of the Recipient. In this tab, you can:

- Change the Recipient on the visit.

DCW/Employee

The DCW/Employee tab contains the Santrax ID and phone number for the DCW or Employee. In this tab, you can:

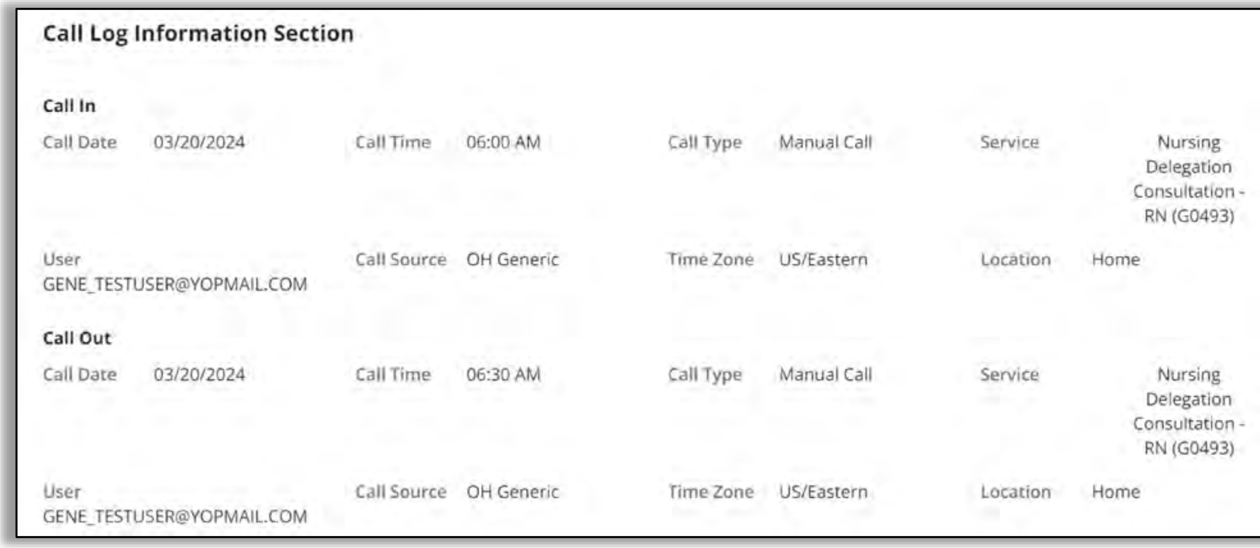
- Change the DCW/Employee on the visit.



Call Log

The Call Log tab contains the visit date, visit time, and method that was used to record the visit. In this tab, you can:

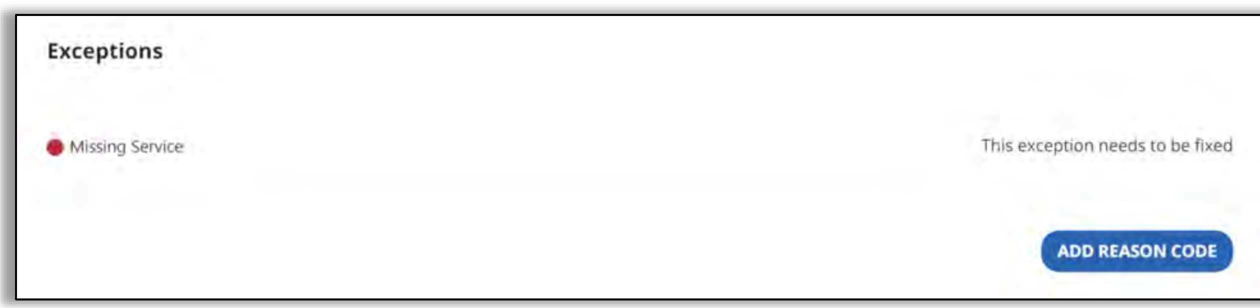
- Add a missing call time, to a visit that has a known Recipient, known DCW/Employee, and at least one call.



Exceptions

The Exceptions tab displays any missing, inaccurate, or otherwise notable information about the visit, and whether the data needs to be fixed, acknowledged, or viewed. In this tab, you can:

- Acknowledge exceptions that do not require fixing.



GPS

The GPS tab displays the location at the start and end of the visit, when available. You cannot make any edits within this tab.

Memo

The Memo tab displays any notes entered in the Visit Note section of Sandata Mobile Connect. In this tab, you can do the following.

- Add a memo for the visit.
- View visit notes recorded in Sandata Mobile Connect.

Claims

The Claims tab displays the Batch ID, Transaction ID, and the date the visit was returned for claims processing. You cannot make any edits within this tab.

History

The History tab displays any changes made to this visit, the date and time the change was made, the reason for the change, and the username of the staff member who made the change. You cannot make any edits within this tab.

REASON CODE	ITEM	DATE	CHANGED BY
99 - Documentation on file supports manual change	Visit - Add Visit	3/20/2024 9:55:03 AM	GENE_TESTUSER@YOPMAIL.COM

10 of 1 entries

Exception Overview

Exceptions alert the user of missing information or information that does not meet program requirements. Exceptions, other than those defined as informational, prevent a visit from being in a Verified status, which means those visits cannot be matched with claims. Below is a list of all the exceptions available in Sandata EVV for this program.

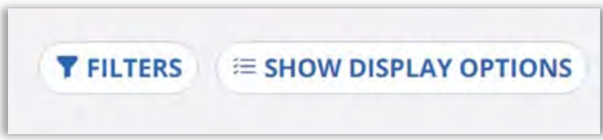
Visit Exception	Description
Unknown Recipient	There is no Recipient record associated with the visit.
Unknown DCW/Employee	There is no Direct Care Worker/Employee record associated with the visit.
Unauthorized / Invalid Service	The service on the visit does not match the service associated with the Recipient.
Missing Service	There is no service on the visit.
Visit Without In-Call	A call-in was not recorded for the visit.
Visit Without Out-Call	A call-out was not recorded for the visit.
Missing Location	There was no location (home or community) selected for the visit.
Missing Medicaid ID	There is no Medicaid ID number in the Recipient record.
No Show	The scheduled visit start time has passed, and the visit does not have an in call.
Late Call	A call-in or call-out did not take place within 15 minutes of the schedule.
Visit Without Any Calls	The scheduled visit end time has passed, and the visit does not have either an in or an out call.

Resolving Exceptions

You will always take the following steps when resolving an exception or making a change to a visit.

1. Select **Visit Maintenance** in the Navigation panel.

2. When the Visit Maintenance screen loads, select the **FILTERS** icon on the right-hand side.



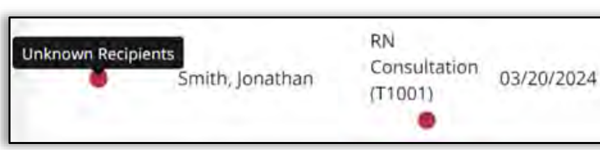
3. Select the date range of the visit you are looking to fix, then select **Apply Filters**.

4. Once you have completed your change, select the Reason Code (a reason note is optional), then select **SAVE**.

NOTE: There is only one reason code, "99 Documentation on file supports manual change."

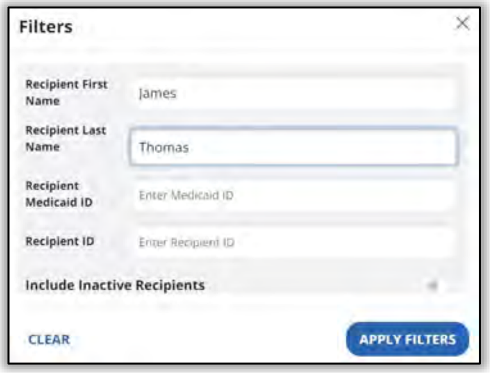
Unknown Recipient

1. Select the exception indicator to open the Recipient tab.



2. Select **FILTERS** at the bottom of the Recipient tab.

3. Enter the first and last name, Medicaid ID, or Recipient ID, then select **APPLY FILTERS**.

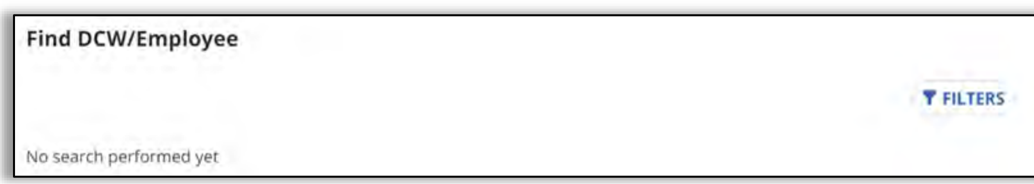


4. When the results display, select the radio button next to the Recipient, then complete the Reason Code.

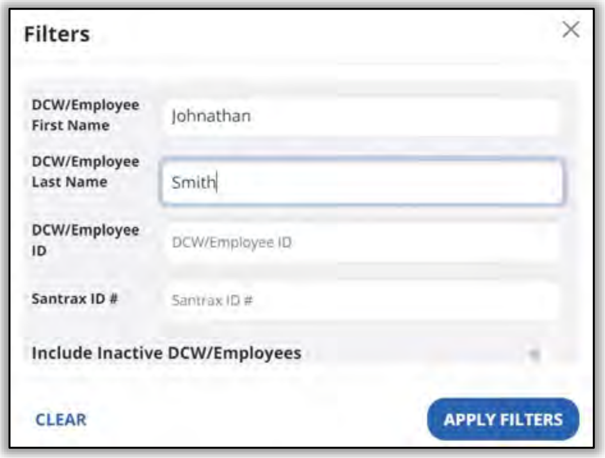
Unknown Direct Care Worker/Employee

1. Select the exception indicator to open the DCW/Employee tab.

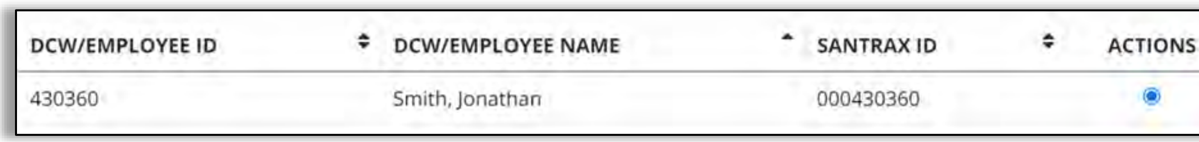
2. Select **FILTERS** at the bottom of the DCW/Employee tab.



3. Enter the first and last name, Medicaid ID, or Recipient ID, then select **APPLY FILTERS**.



4. When the results display, select the radio button next to the DCW/Employee, then complete the Reason Code.

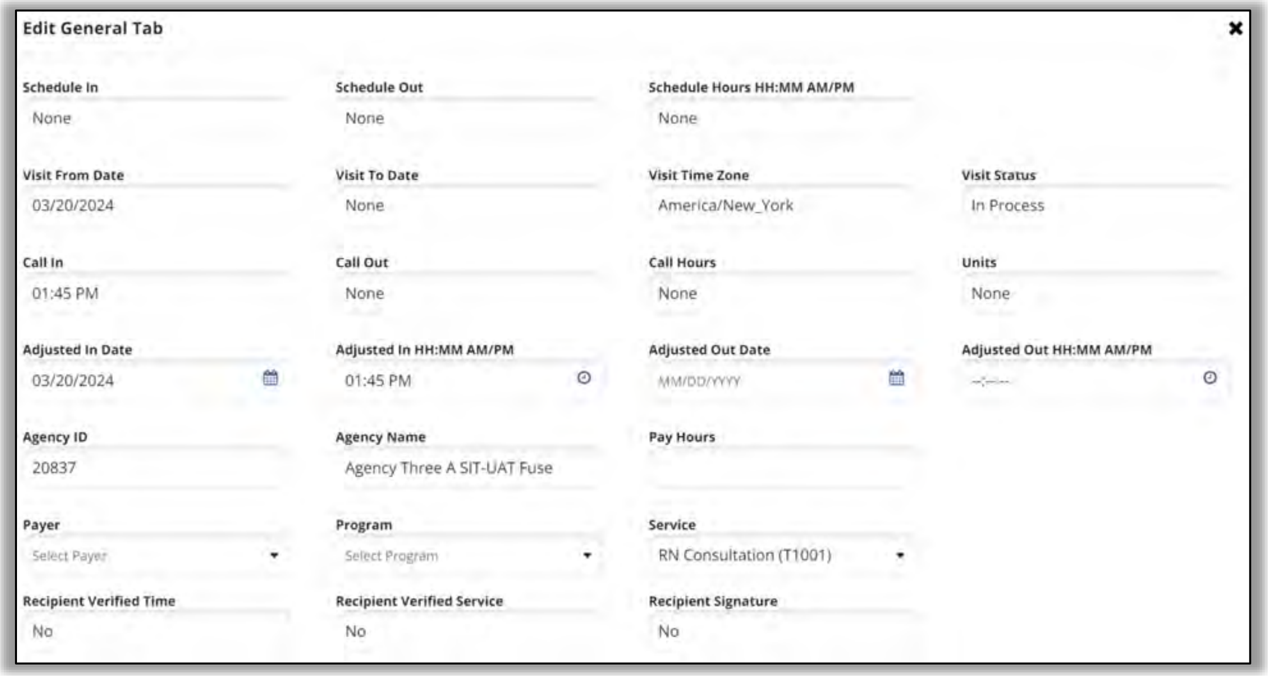


DCW/EMPLOYEE ID	DCW/EMPLOYEE NAME	SANTRAX ID	ACTIONS
430360	Smith, Jonathan	000430360	

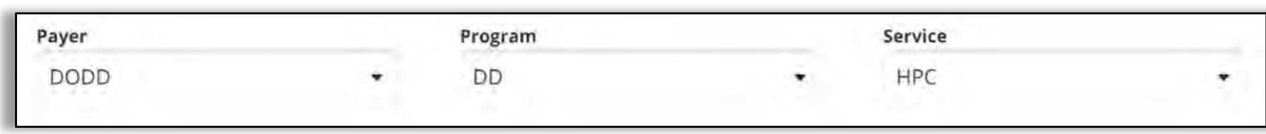
Unauthorized / Invalid Service

1. Select the exception indicator to open the General tab.

2. Select the **pencil** icon in the right-hand corner.



3. Correct the service details using the dropdown menu options. You must select the Service FIRST, then the Program and Payer. Then complete the Reason Code.

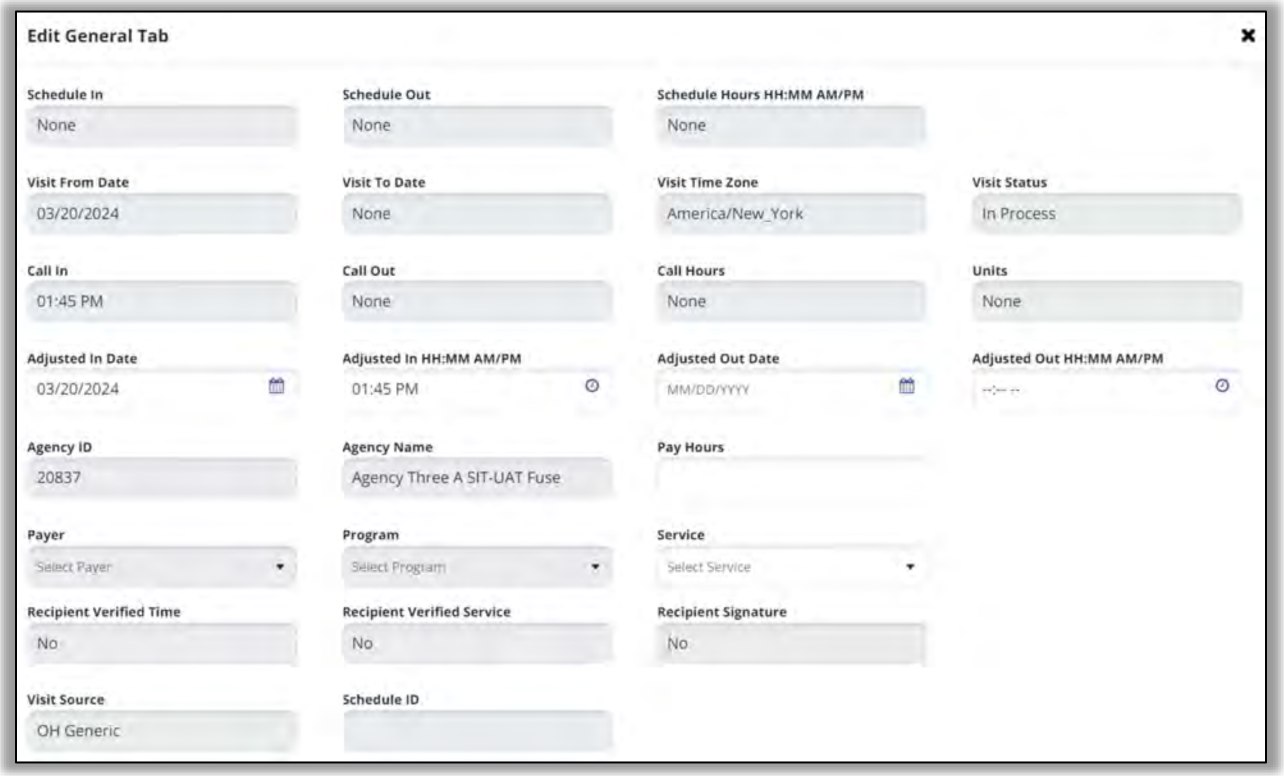


NOTE: Use the Recipient section of this guide for help finding the Recipient payer, program, and service.

Missing Service

1. Select the exception indicator to open the General tab.

2. Select the **pencil** icon in the right-hand corner to open the popup.

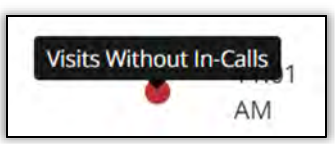


3. Correct the service details using the dropdown menu options. You must select the Service FIRST, then the Program and Payer. Then complete the Reason Code.

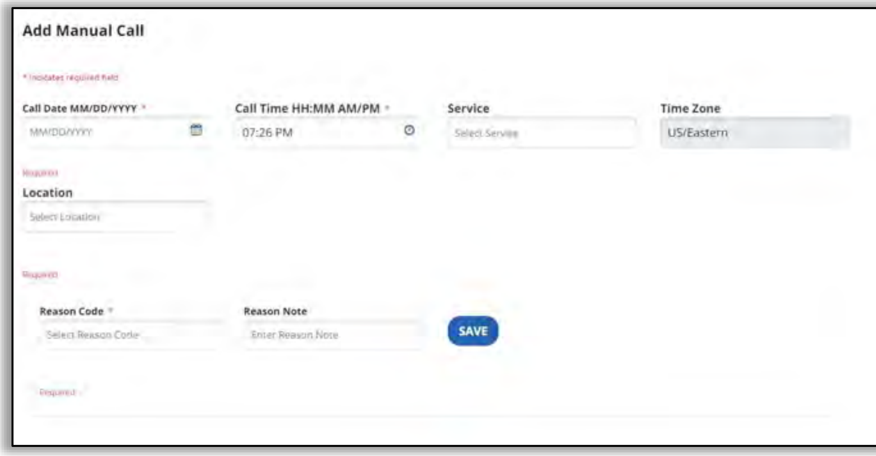
NOTE: Use the Recipient section of this guide for help finding the Recipient payer, program, and service.

Visit Without In-Call and Visit Without Out-Call

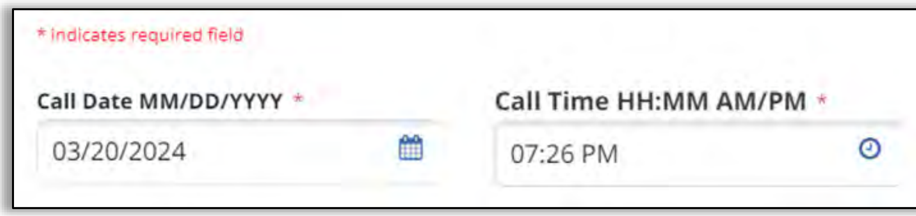
1. Select the exception indicator to open the Call Log tab.



2. Scroll down to the Add Manual Call section.

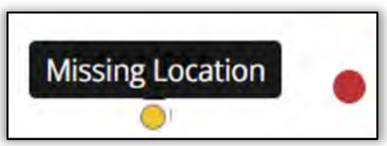


3. Add the Call Date and Call Time, then complete the Reason Code.

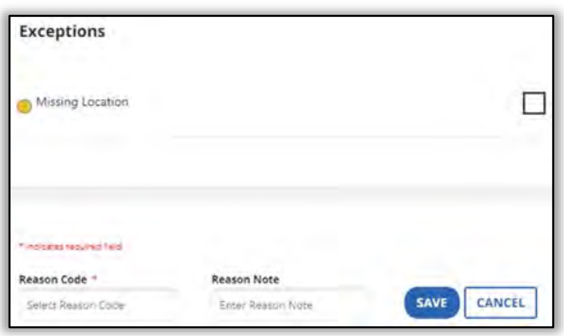


Missing Location

1. Select the exception indicator to open the Exceptions tab.



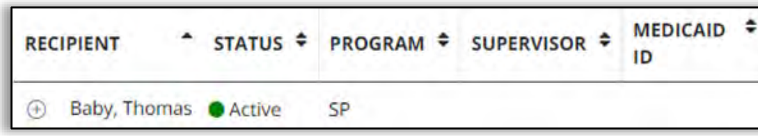
2. Select the checkbox to acknowledge the exception, then complete the Reason Code.



Missing Medicaid ID

1. Select Recipients > Recipient Management from the navigation panel.

2. Select the Recipient record.



3. On the Personal tab, select the **pencil** icon in the Identifiers tab.

4. Add the Recipient Medicaid ID number, then select **SAVE**.

No Show

The No Show exception will only be displayed during the scheduled visit time. Once the visit time has elapsed, the Visit Without Any Calls exception will be applied.

Late Call

If a visit has a late call, you may either acknowledge the exception, or adjust the time, to reflect what occurred at the point of care.

Visit Without Any Calls

If a visit does not have any calls, use the **Create Visit** button.

Other Visit Maintenance Adjustments

There will be times a visit requires an edit that is not related to an exception. For example, there may be a start time in EVV that is later than the time care began.

Merge Calls

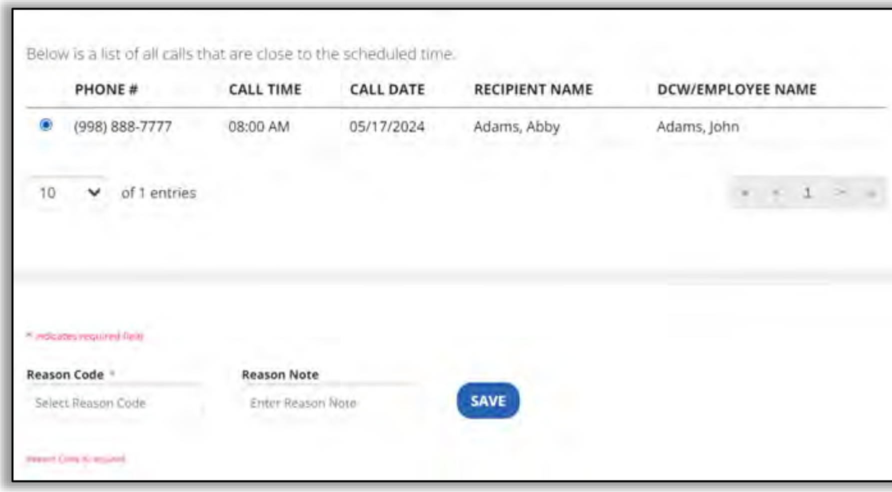
If a visit is missing a call in or call out, and there is an existing call in or call out with matching data elements, you can merge the two calls together.

1. Open the visit.

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT
Adams, Abby	Adams, John		05/17/2024				08:00 AM	
Adams, Abby	Adams, John	Physical Therapies (G0151)	05/17/2024				10:00 AM	

2. Select the **Merge Calls** tab.

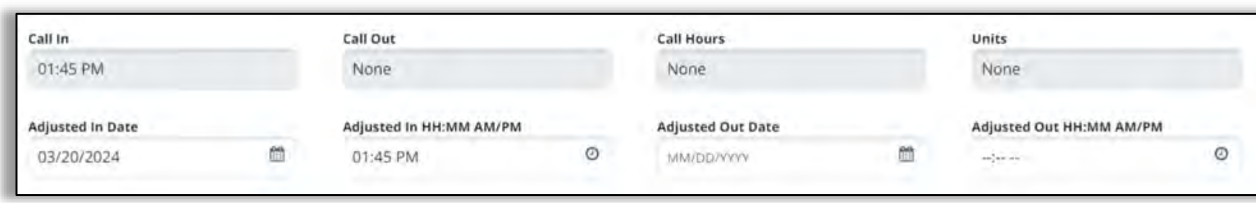
3. Select the appropriate matching call, select the Reason Code, then select **SAVE.**



Adjusting Times

1. Open the visit.

2. On the General tab, update the call in or call out details, then add the Reason Code.

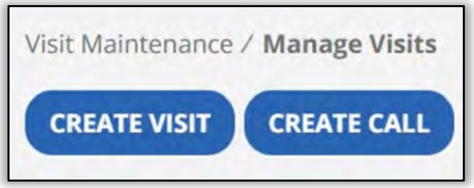


NOTE: When a call time is adjusted, both the original time and the adjusted time will display. The adjusted time will be used for unit calculation.

Creating a Manual Call

NOTE: You should make every attempt to verify the visit was completed prior to adding a manual visit or call. This could mean checking the timesheets or calling the Recipient/authorized representative or case manager to ensure the visit occurred.

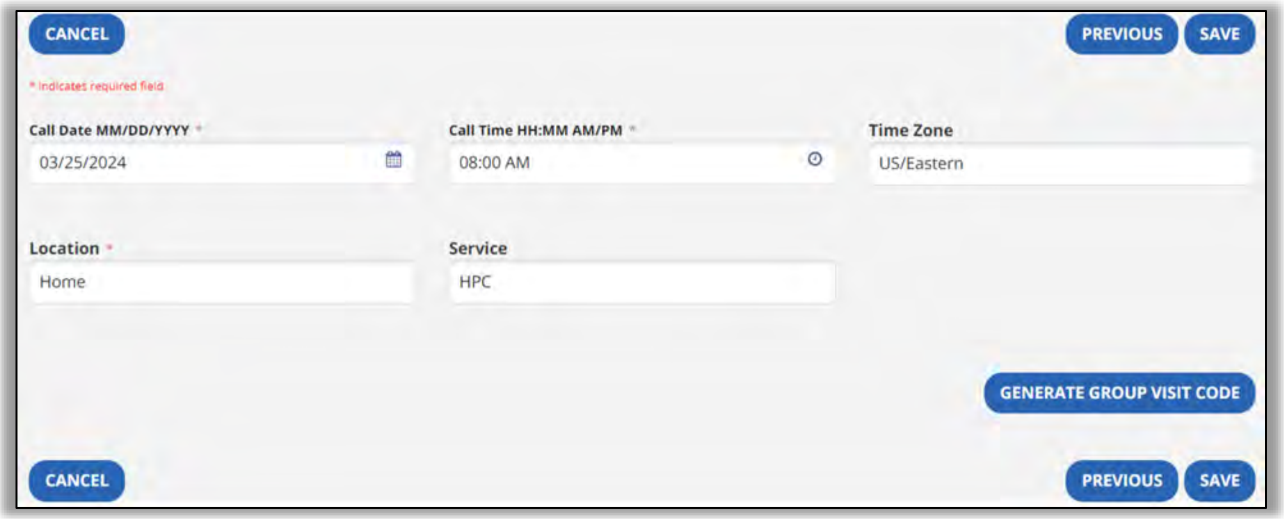
1. On the Visit Maintenance screen, select **CREATE CALL**.



2. Select the radio button next to the Recipient's name. You can also use the filter options to narrow your search results. Once the radio button is selected, select **NEXT**.

3. Agency only: Select the radio button next to the DCW or Employee's name. You can also use the filter options to narrow your search results. Once the radio button is selected, select **Next**.

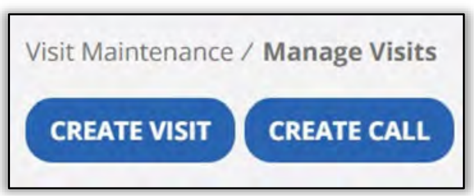
4. Complete all required fields, then select **SAVE.**



Creating a Manual Visit

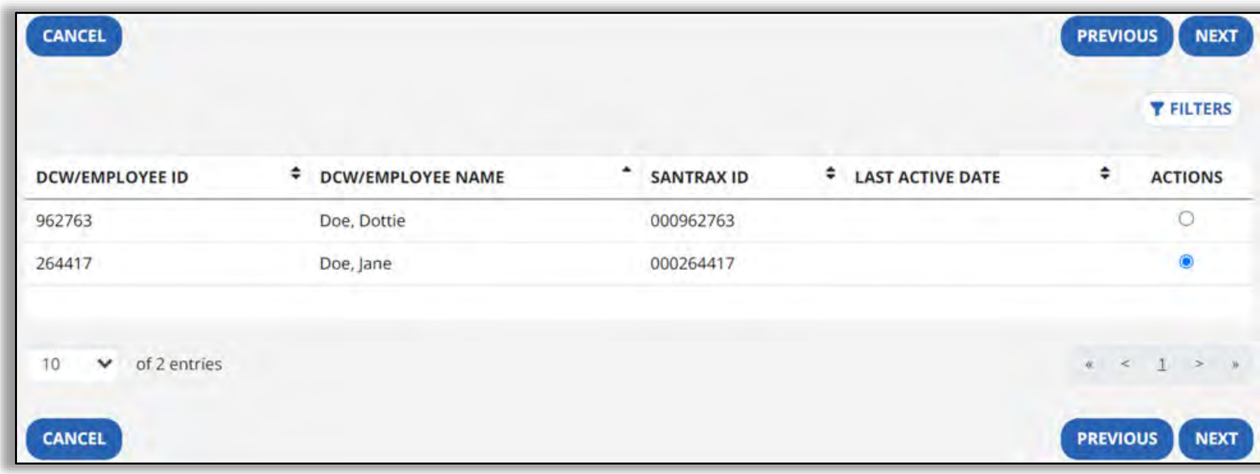
NOTE: You should make every attempt to verify the visit was completed prior to adding a manual visit or call. This could mean checking the timesheets or calling the Recipient/authorized representative or case manager to ensure the visit occurred.

1. On the Visit Maintenance screen, select **CREATE VISIT**.

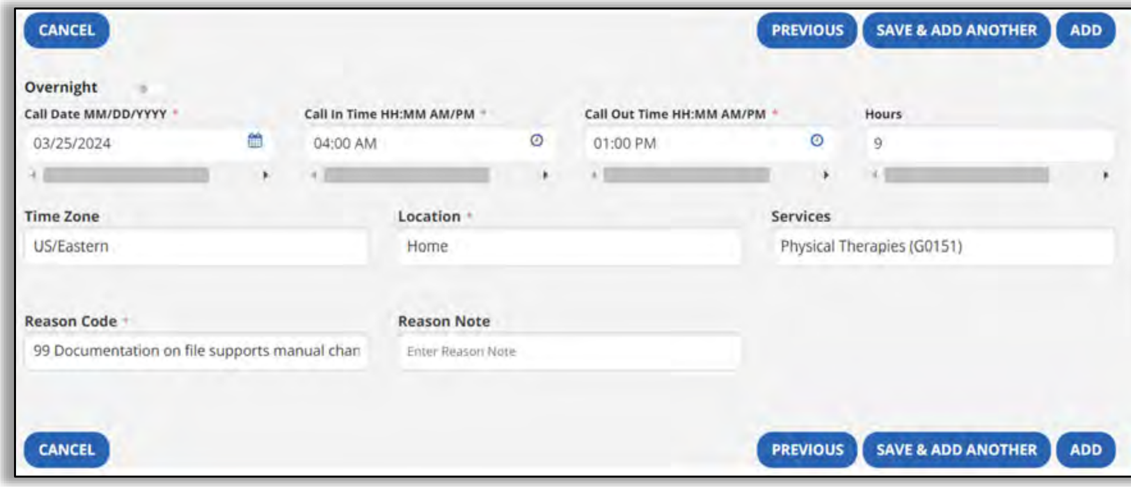


2. Select the radio button next to the Recipient's name. You can also use the filter options to narrow your search results. Once the radio button is selected, select **NEXT**.

3. Agency only: Select the radio button next to the DCW or Employee's name. You can also use the filter options to narrow your search results. Once the radio button is selected, select **NEXT**.



4. Complete all required fields, then select **ADD**.



NOTE: This date and time cannot be in the future.

11. Reports

Module Objectives

- Access reports.
- Preview and save reports.
- Schedule reports.

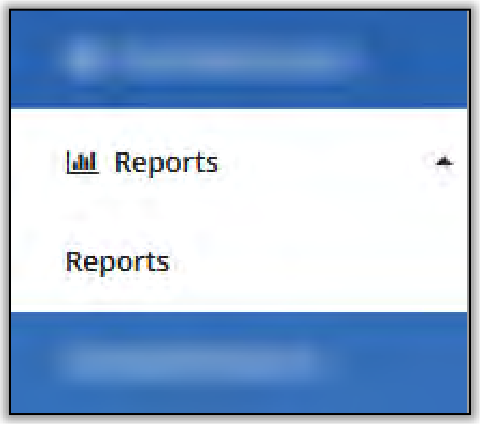
Reports Introduction

There are multiple reports available within Sandata EVV. Different users may have access to different reports based on their roles and permissions. When reports are generated, they can be saved in a variety of file formats.

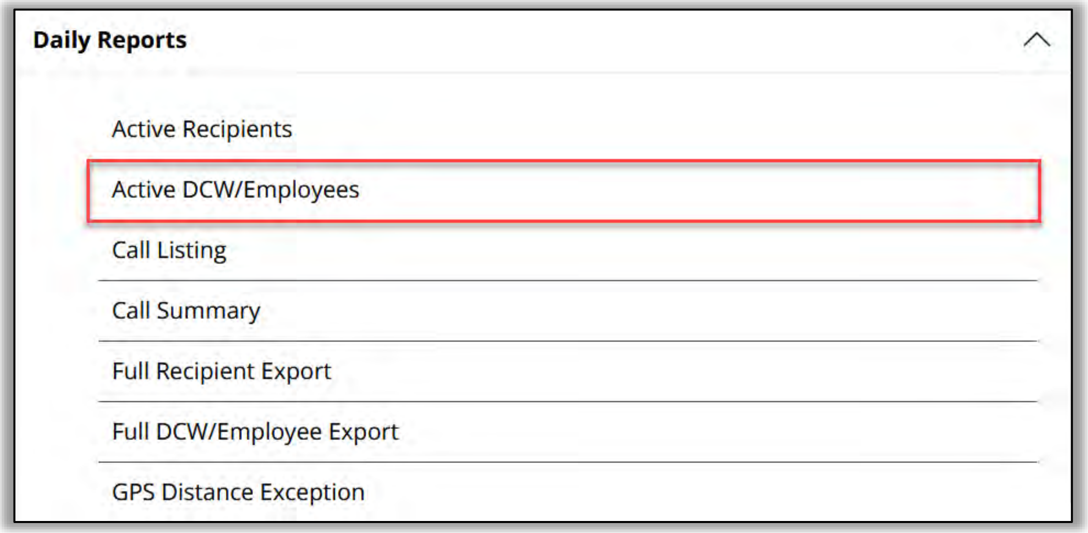
There are multiple filters that enable users to retrieve only the data they want to see.

Running a Report

1. Select **Reports** > **Reports** from the Navigation panel. The list of reports displays.

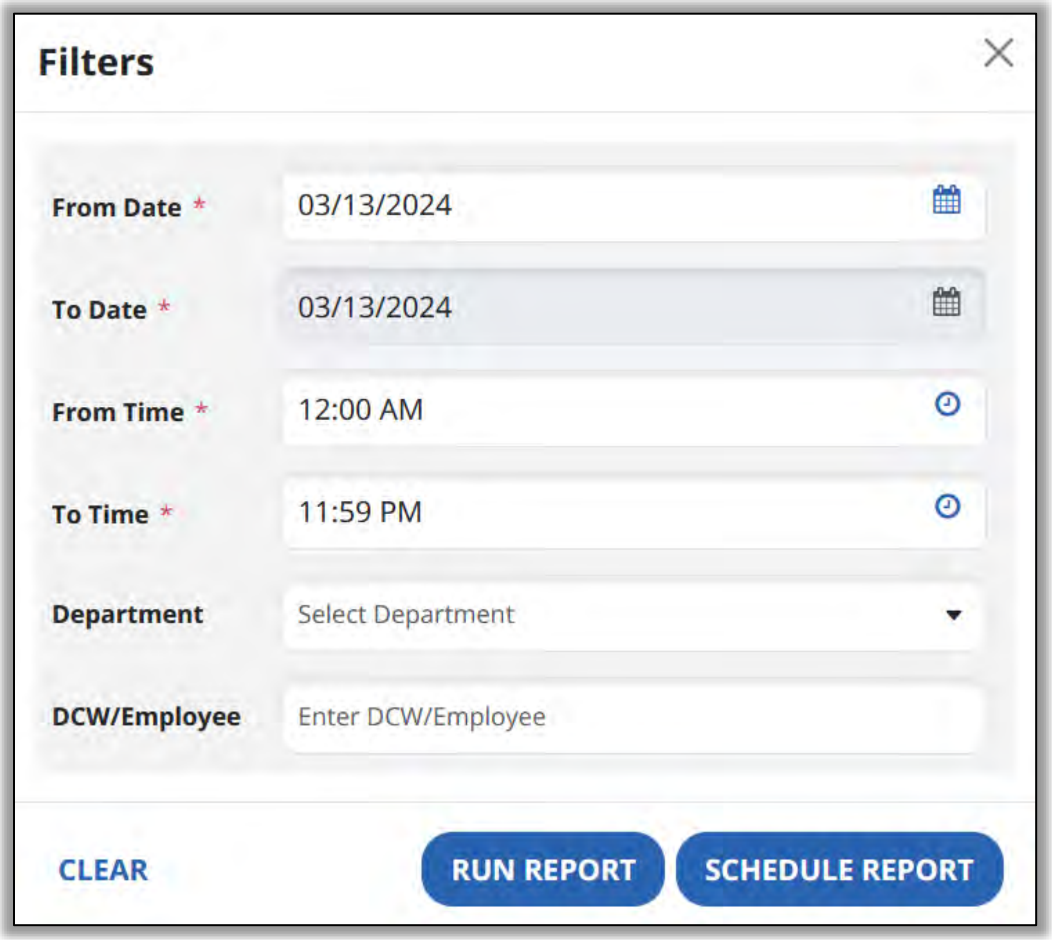


2. Reports are organized into categories. Select the Report Name of the report to run.



NOTE: If needed, the list of reports can be collapsed into categories. Use the collapse button to collapse the list. Use the category header to expand reports under that category.

3. Enter filters for the report, including the period.



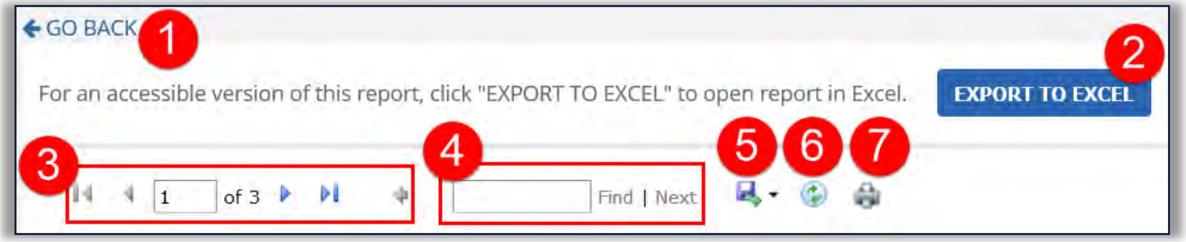
NOTE: For reports that are for a single day, the default From Date is always the current day's date and the To Date field is unavailable.

4. Set any other desired parameters for the report such as a Recipient, Department, or DCW/Employee.

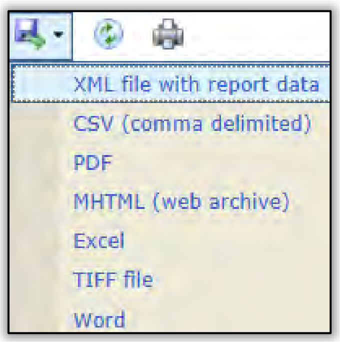
NOTE: Parameters vary based on the selected report. Selecting parameters will filter the report to only the matching results.

5. Select **RUN REPORT**. The Preview Report screen opens.

Navigating a Report



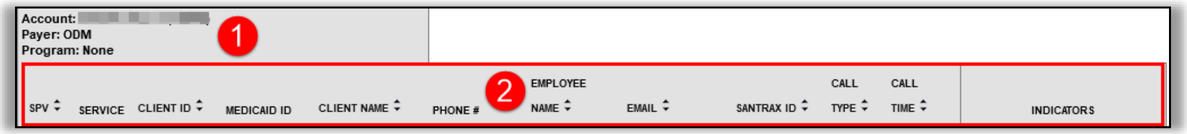
1. **Go Back**: This link closes the Preview Report screen and re-displays the report search parameters.
2. **Export to Excel:** This button produces an accessible version of the report in Microsoft Excel.
3. **Page Navigation:** This section will display the current page vs. the total number of pages. 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:



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

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



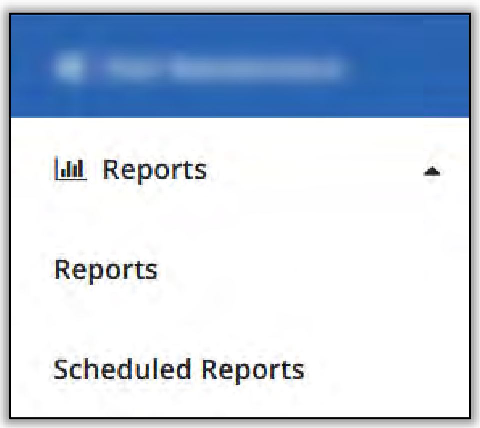
1. **Report Grouping Tab:** This tab displays general information pertaining to the report as well as the sections for grouped reports.
2. **Column Header:** Selecting a column's header will sort the results in either ascending or descending order based on that column's content. **NOTE**: Only columns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

When a column is sorted, a vertical arrow indicates which column, and in which order it is sorted.

Scheduling a Report

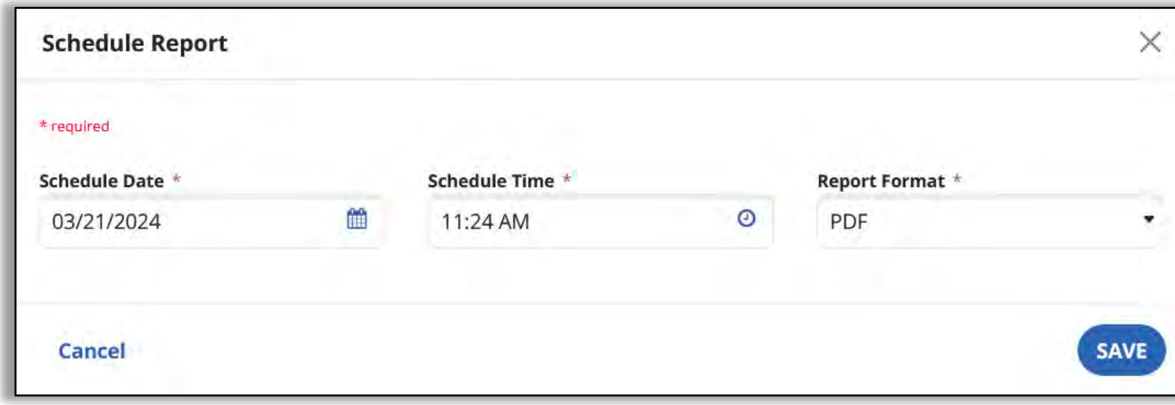
Scheduling reports is like running reports. Users still provide the parameters of the report, but instead of running the report immediately, users schedule the report to run at a future date and time. After the reports have been run, the user will receive an email notification, and the report will be available for download.

1. Select **Reports** > **Reports** from the Navigation panel. The list of reports displays.

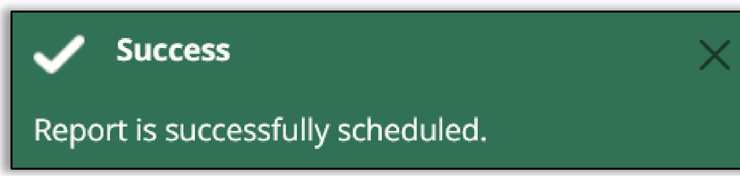


2. Select the Report Name of the report to run.

3. Select the period of the report.
4. Set any other desired parameters for the report such as a Recipient, Department, or DCW/Employee.
5. Select **Schedule Report**. The Schedule Report screen displays.
6. Enter the date and time that the report should run and select the file format for the results.



7. Select **SAVE**. A green confirmation message indicates that the report has been scheduled successfully.



Retrieving a Scheduled Report

1. Select **Reports** > **Scheduled Reports** from the Navigation panel. The list of scheduled reports is displayed.

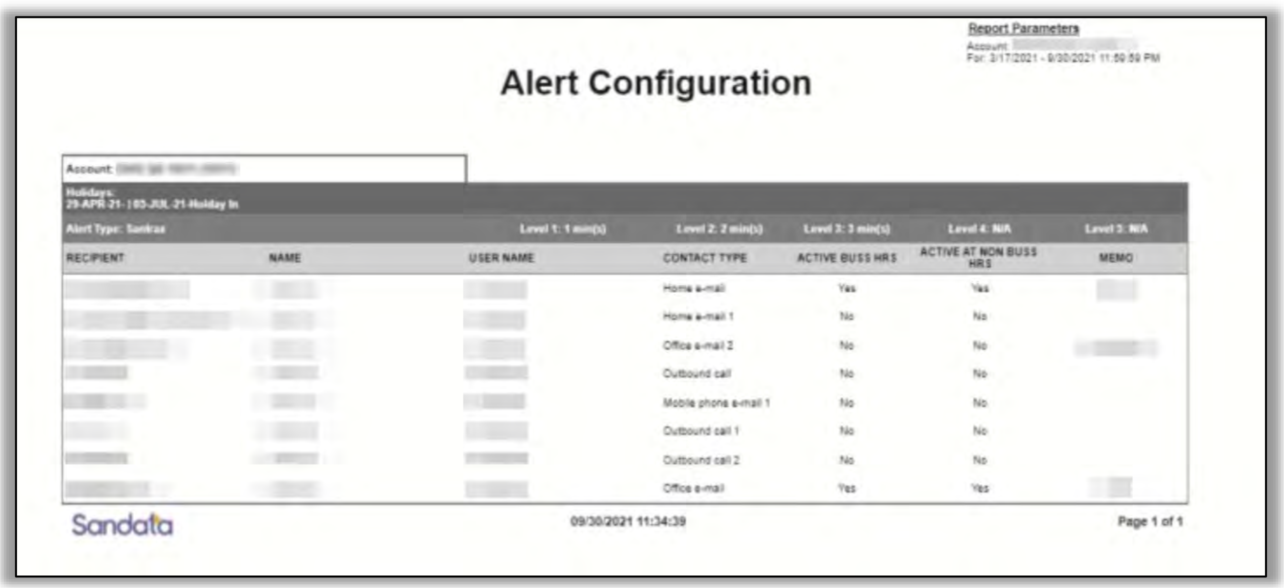
REPORT NAME	SCHEDULED REPORT DATE & TIME	ACTIONS
Recipient Visit Summary	3/21/2024 11:36 AM	
Recipient Visit Summary	3/21/2024 11:36 AM	
Recipient Visit Summary	3/21/2024 11:36 AM	

2. If a scheduled report has been completed, a download icon will appear in the Actions column on the line for the report.
3. Select the **download** icon to download the results.

Alerts Report Library

Alert Configuration Report: This report displays the alert configuration including the type of alert, the thresholds for when the alerts are sent for each level and information about to whom the alerts are sent.

Use this report to audit the alerts configured to be sent and review the contact the alert is sent to when an in-call for a scheduled visit is not received in a timely manner.



Report Parameters
Account:
For: 3/17/2021 - 9/30/2021 11:59:59 PM

Alert Configuration

Account:

Holidays:
29-APR-21- | 03-JUL-21-Holiday In

Alert Type: Santrax		Level 1: 1 min(s)	Level 2: 2 min(s)	Level 3: 3 min(s)	Level 4: N/A	Level 3: N/A
RECIPIENT	NAME	USER NAME	CONTACT TYPE	ACTIVE BUSS HRS	ACTIVE AT NON BUSS HRS	MEMO
[illegible]	[illegible]	[illegible]	Home e-mail	Yes	Yes	[illegible]
[illegible]	[illegible]	[illegible]	Home e-mail 1	No	No	
[illegible]	[illegible]	[illegible]	Office e-mail 2	No	No	[illegible]
[illegible]	[illegible]	[illegible]	Outbound call	No	No	
[illegible]	[illegible]	[illegible]	Mobile phone e-mail 1	No	No	
[illegible]	[illegible]	[illegible]	Outbound call 1	No	No	
[illegible]	[illegible]	[illegible]	Outbound call 2	No	No	
[illegible]	[illegible]	[illegible]	Office e-mail	Yes	Yes	[illegible]

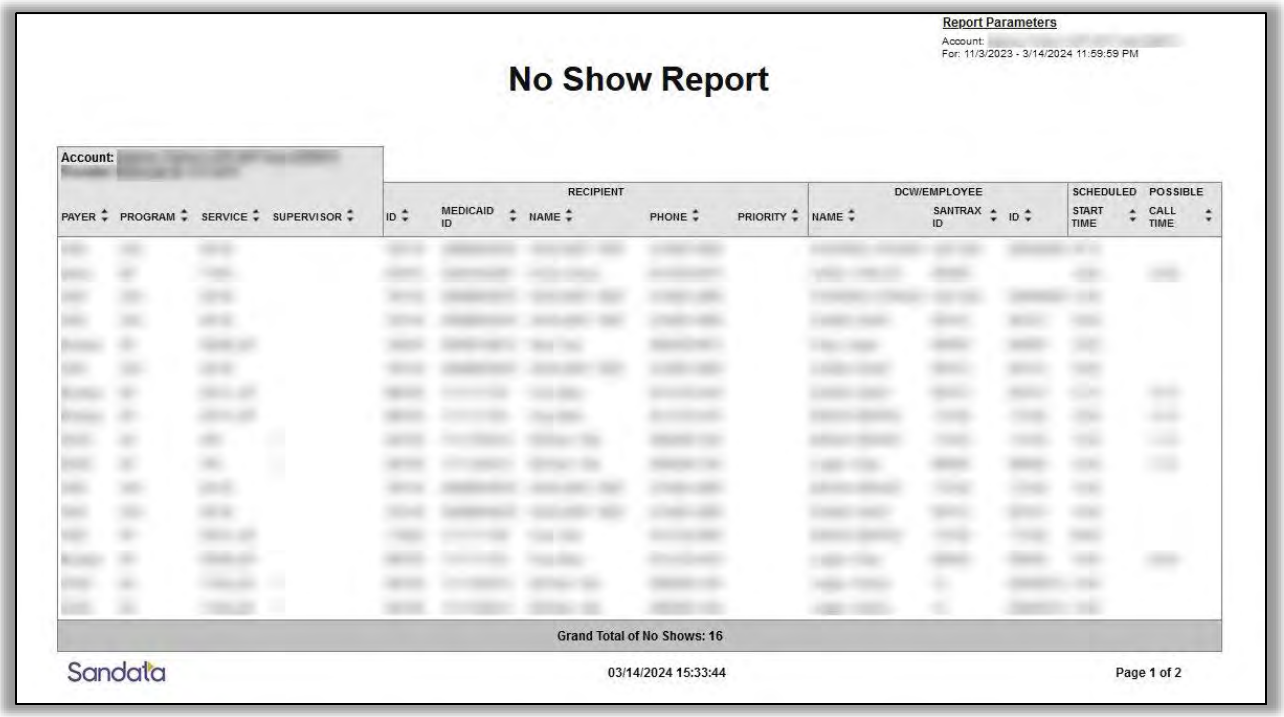
Sandata 09/30/2021 11:34:39 Page 1 of 1

Alert Listing Report: This report shows a listing of all alerts sent during the selected date range. The report includes information about each alert sent, including the message sent, the Recipient, and the date and time of the message.

Use this report to audit alerts sent and understand whether appropriate processes are in place within an agency when services are not delivered as scheduled.

No Show Report: This report shows all missed scheduled visits (no shows) occurring during a selected date range. The report provides the visit information including the Recipient's name and primary phone number, the field staff member, and their DCW/Employee information.

Use this report to monitor and review any missed visits that occurred during a specific period.



Report Parameters
Account:
For: 11/3/2023 - 3/14/2024 11:59:59 PM

No Show Report

Account:

				RECIPIENT					DCW/EMPLOYEE			SCHEDULED	POSSIBLE
PAYER	PROGRAM	SERVICE	SUPERVISOR	ID	MEDICAID ID	NAME	PHONE	PRIORITY	NAME	SANTRAX ID	ID	START TIME	CALL TIME

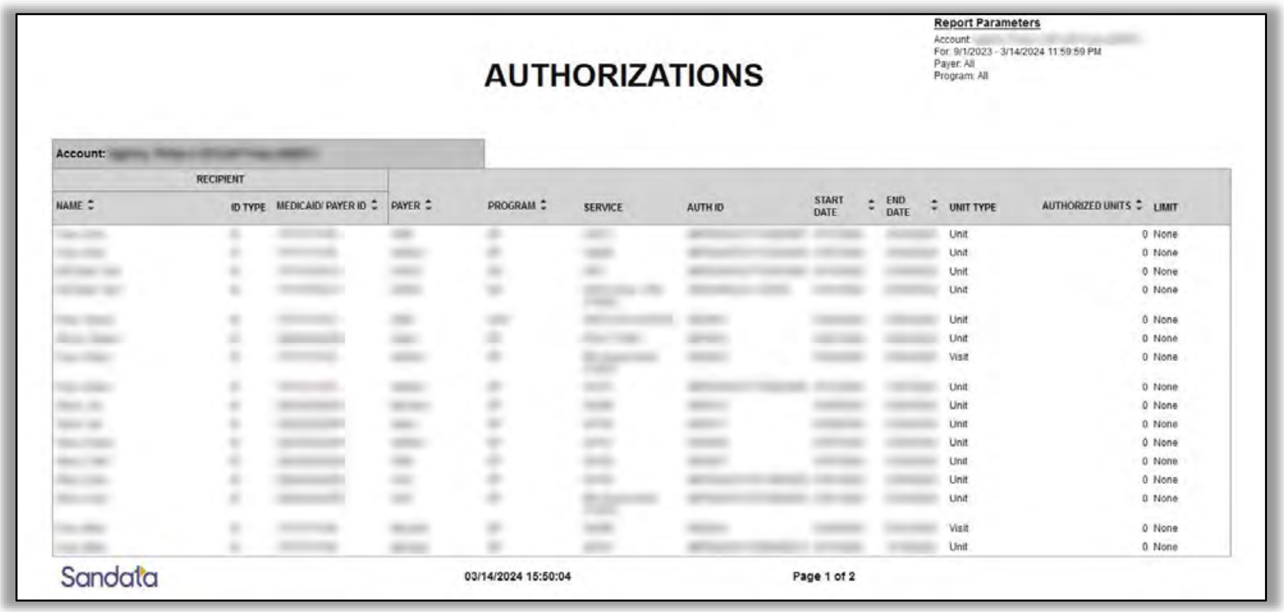
Grand Total of No Shows: 16

Sandata 03/14/2024 15:33:44 Page 1 of 2

Authorizations Report Library

Authorizations Report: This report displays a list of all authorizations in the system as of the selected day.

Use this report to view all authorizations over the selected date range. This report displays any authorizations in effect on any day that falls within the selected date range. The report helps monitor overall authorization information.



Report Parameters
Account: [illegible]
For: 9/1/2023 - 3/14/2024 11:59:59 PM
Payer: All
Program: All

AUTHORIZATIONS

Account: [illegible]

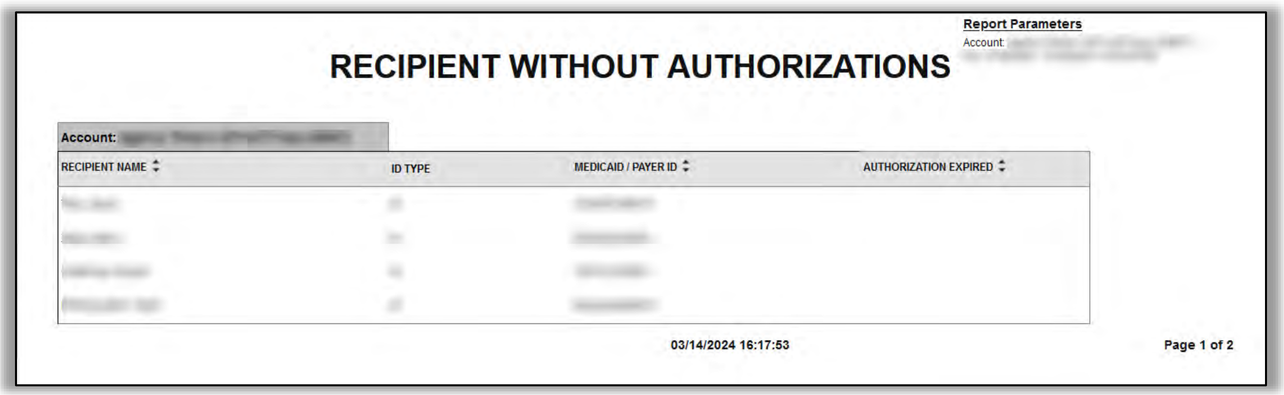
RECIPIENT											
NAME	ID TYPE	MEDICAID/ PAYER ID	PAYER	PROGRAM	SERVICE	AUTH ID	START DATE	END DATE	UNIT TYPE	AUTHORIZED UNITS	LIMIT
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Visit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Visit	0	None
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Unit	0	None

Sandata 03/14/2024 15:50:04 Page 1 of 2

Recipients Without Authorizations Report: This report displays a listing of all Recipients that do not have an authorization as of the selected date. Recipients with one or more authorizations active as of the selected date do not appear in this report.

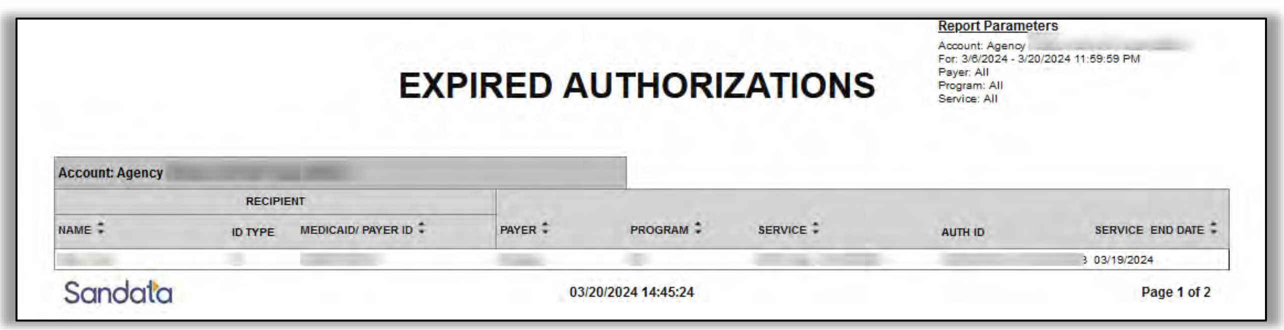
Use this report to identify Recipients for whom authorizations for the payer are required or services that should be ended.

> **NOTE:** While Recipients may have multiple authorizations, this report only displays Recipients without any authorizations as of the selected date.



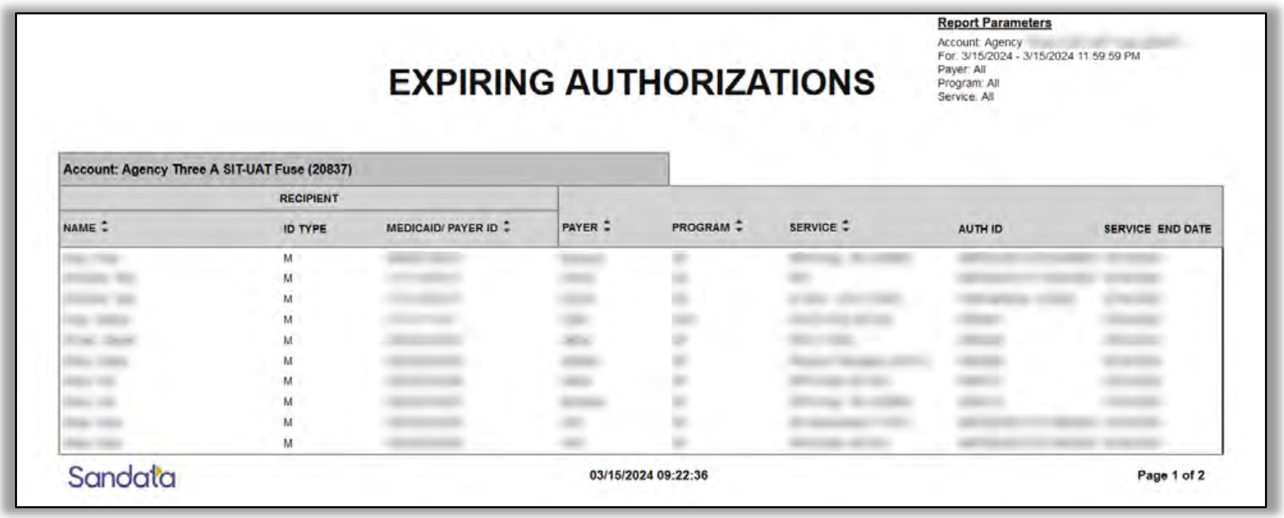
Expired Authorizations Report: This report displays a listing of authorizations that have expired as of the selected date.

Use this report to view expired authorizations and determine whether replacement authorizations need to be obtained. Only authorizations that have not been replaced by a subsequent authorization for the same service are displayed in this report.



Expiring Authorizations Report: This report displays a listing of authorizations that will expire within 31 days of the selected date.

Use this report to review all expiring authorizations and quickly determine which authorizations require action to either end services or obtain an updated or new authorization for the Recipient. The best practice is to run this report for the current date to identify authorizations that will be expiring.



Manual Authorization Visits Report: This report shows authorizations manually created by a provider.

Use this report to understand which authorizations were manually entered into the system.

Report Parameters
Account:
For: 3/11/2024 - 3/12/2024 11:59:59 PM

MANUAL AUTHORIZATION VISITS

Account
Provider ID:

Authorization Reference Number: | Begin Date: 01/01/2024 | End date: 03/30/2024
Program: DD | HCPCS : T1003 | Total Units/Hours: 0

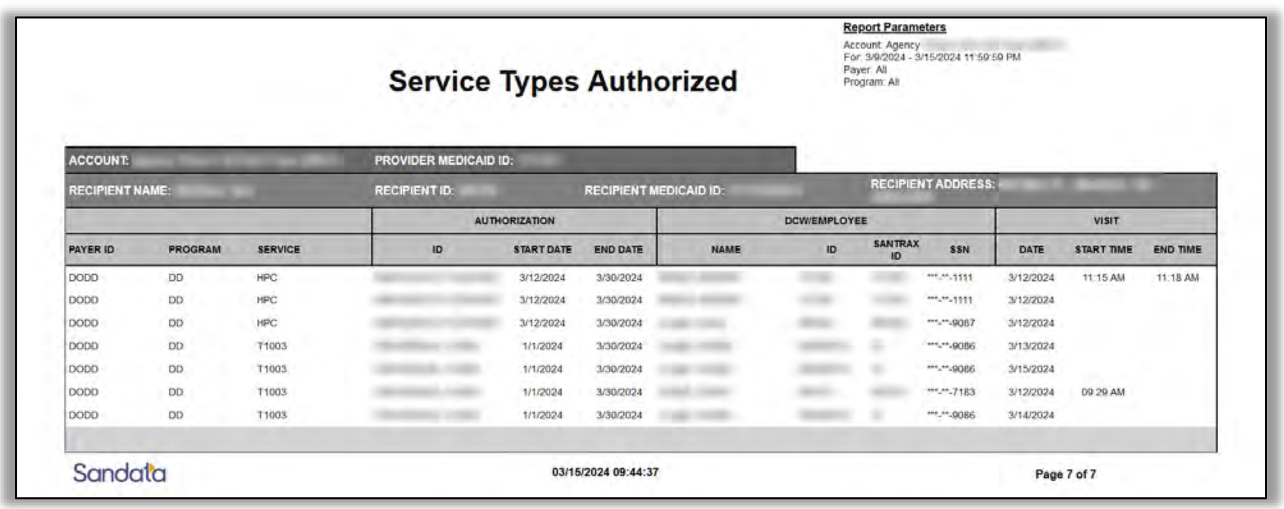
RECIPIENT MEDICAID ID	RECIPIENT NAME	DCW/EMPLOYEE NAME	SANTRAX ID	DCW/EMPLOYEE ID	VISIT DATE	START TIME	END TIME	START LOCATION	END LOCATION	VISIT STATUS	HOURS

Total Verified Units/Hours: 0 | Over Authorized Units/Hours: Unknown

Grand Total: 21

Sandata 03/15/2024 09:31:12 Page 3 of 3

Service Types Authorized Report: This report provides a summary of related services performed including visit data, programs, provider, and DCW/Employee.



Report Parameters
Account: Agency
For: 3/9/2024 - 3/15/2024 11:59:59 PM
Payer: All
Program: All

Service Types Authorized

ACCOUNT: | PROVIDER MEDICAID ID:

RECIPIENT NAME: | RECIPIENT ID: | RECIPIENT MEDICAID ID: | RECIPIENT ADDRESS:

			AUTHORIZATION			DCW/EMPLOYEE				VISIT		
PAYER ID	PROGRAM	SERVICE	ID	START DATE	END DATE	NAME	ID	SANTRAX ID	SSN	DATE	START TIME	END TIME
DODD	DD	HPC		3/12/2024	3/30/2024				***-**-1111	3/12/2024	11:15 AM	11:18 AM
DODD	DD	HPC		3/12/2024	3/30/2024				***-**-1111	3/12/2024		
DODD	DD	HPC		3/12/2024	3/30/2024				***-**-9087	3/12/2024		
DODD	DD	T1003		1/1/2024	3/30/2024				***-**-9086	3/13/2024		
DODD	DD	T1003		1/1/2024	3/30/2024				***-**-9086	3/15/2024		
DODD	DD	T1003		1/1/2024	3/30/2024				***-**-7183	3/12/2024	09:29 AM	
DODD	DD	T1003		1/1/2024	3/30/2024				***-**-9086	3/14/2024		

Sandata 03/15/2024 09:44:37 Page 7 of 7

Billing Report Library

Claims Validation Rejection Report: This report shows all claims validation requests that were returned unsuccessfully to the payer from Sandata's Claims Validation system. The report shows the request including the error message returned.

Use this report to quickly identify claims where matching EVV information was not found. This can assist in identifying visits that require action so they can be resubmitted to the claims validation system.

Report Parameters
Account:
For 6/24/2021 - 6/24/2021 11:59:59 PM

Claims Validation Rejection

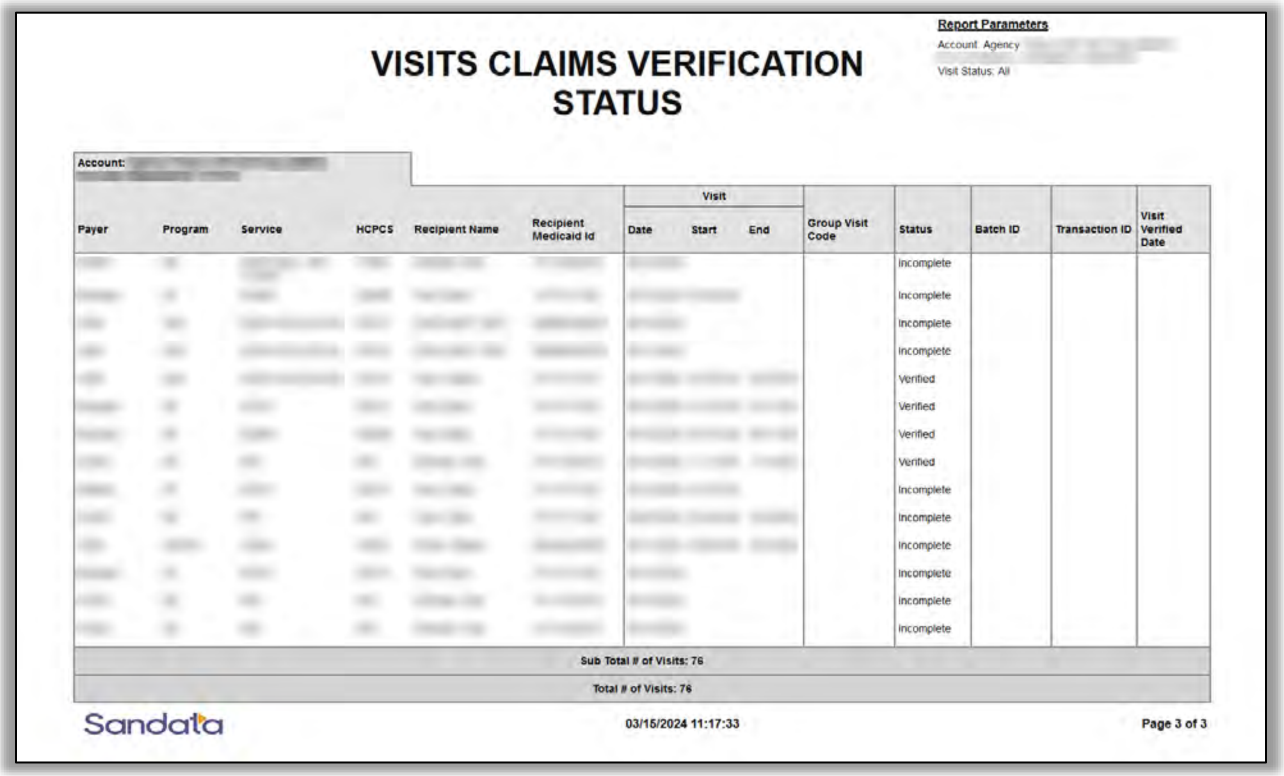
Account:
Provider: 9021099

RECEIVED	BATCH ID	TRANS ID	INVOICE CONTROL NO	LINE NO	CLIENT ID	VISIT RANGE	PAYER	PROGRAM	SERVICE	BILL UNITS	EXCEPTION	PROVIDER MEDICAID ID	CLIENT MEDICAID ID	CLIENT NAME	UNITS FOUND	VISITS
6/24/2021 11:40:54 AM	303952208194	303952208194	303952208194	01		06/24/2021 06/24/2021			T1000	5	2 - No visit found	9021099	999999994848		5	0
6/24/2021 12:18:10 PM	2021062412171489	2021062412171489	99911219110	47		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:10 PM	2021062412222278	0624120192221	0624120192221	49		11/01/2019 11/01/2019			G0156	8	2 - No visit found	9021099	608155734		8	0
6/24/2021 12:24:10 PM	2021062412222278	0624120192221	0624120202221	49		11/01/2019 11/01/2019			G0156	8	2 - No visit found	9021099	608155734		8	0
6/24/2021 12:24:10 PM	2021062412222278	0624120202221	0624120212221	49		11/01/2019 11/01/2019			G0156	8	2 - No visit found	9021099	608155734		8	0
6/24/2021 12:24:27 PM	2021062412242712	2021062412242712	99911219110	04		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:27 PM	2021062412242764	2021062412242764	99911219110	04		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:28 PM	2021062412242854	2021062412242854	99911219110	04		11/01/2019 11/01/2019			G0156	10	2 - No visit found	9021099	608155734		10	0
6/24/2021 12:24:29 PM	2021062412242892	2021062412242892	99911219110	04		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:29 PM	2021062412242932	2021062412242932	99911219110	04		12/01/2019 12/01/2019			G0156	8	2 - No visit found	9021099	608155734		8	0
6/24/2021 12:24:30 PM	2021062412243009	2021062412243009	99911219110	04		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:30 PM	2021062412243048	2021062412243048	99911219110	04		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:31 PM	2021062412243094	2021062412243094	99911219110	04		11/01/2019 11/01/2019			G0156	10	2 - No visit found	9021099	608155734		10	0
6/24/2021 12:24:31 PM	2021062412243129	2021062412243129	99911219110	04		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:24:31 PM	2021062412243165	2021062412243165	99911219110	04		12/01/2019 12/01/2019			G0156	8	2 - No visit found	9021099	608155734		8	0
6/24/2021 12:26:10 PM	2021062412241342	2021062412241342	99911219110	47		11/01/2019 11/01/2019			G0156	16	2 - No visit found	9021099	608155734		16	0
6/24/2021 12:28:10 PM	2021062412261879 4	0624129692621	0624129702621	47		01/02/2019 01/02/2019			G0299	8	2 - No visit found	9021099	811111111119		8	0
6/24/2021 12:30:10 PM	2021062412281550 6	0624127662821	0624127662821	47		01/01/2019 01/01/2019			T1001	1	2 - No visit found	9021099	118846083960		1	0

Sandata 09/07/2021 16:54:49 Page 1 of 1

Visit Claims Verification Status Report: This report displays all visits within the selected date range and shows the last time each visit was returned to the payer for validation.

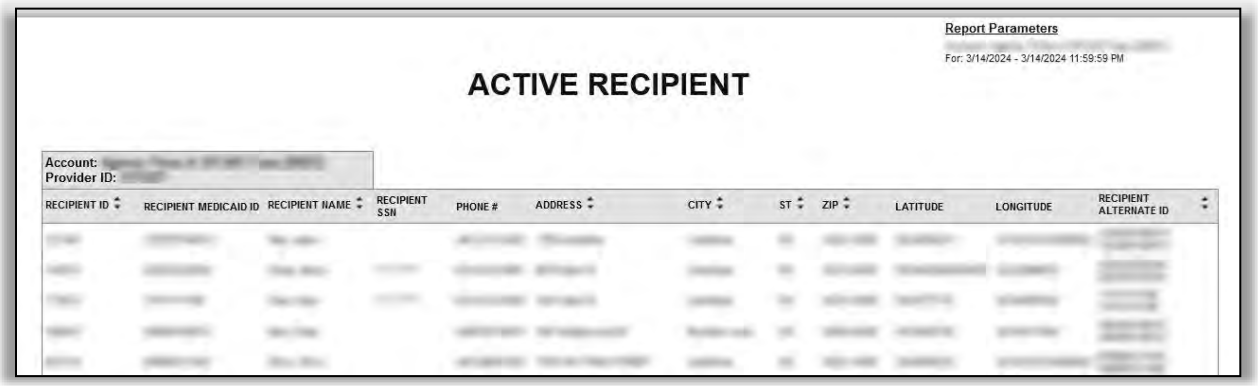
Use this report to track the status of visits relative to claims validation. It can be used to review when a particular visit was returned to the adjudicating system.



Daily Report Library

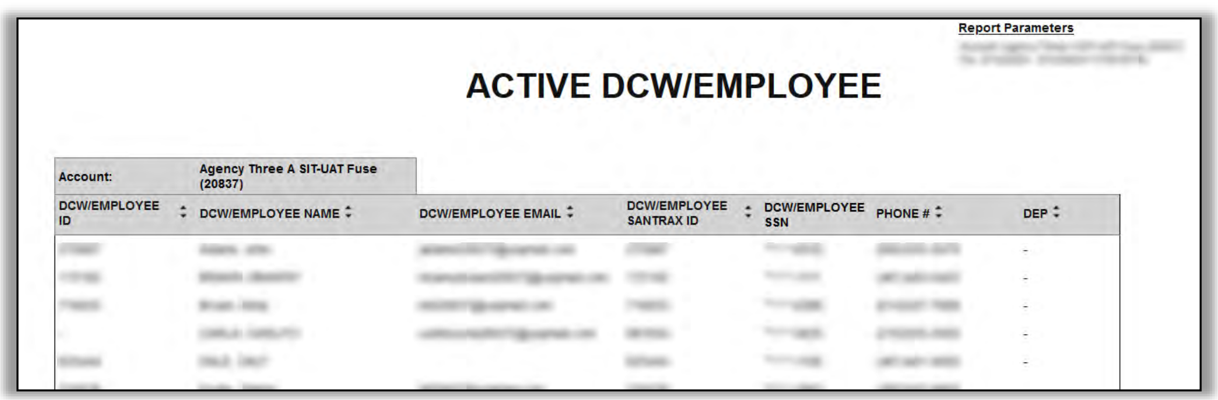
Active Recipients Report: This report lists all active Recipients as of the date selected.

Use this report to view all Recipient’s phone numbers, active addresses, captured GPS locations, the Recipient’s Medicaid ID (for SMC). Recipient ID (for TVV) and the Recipient Alternate ID if available.



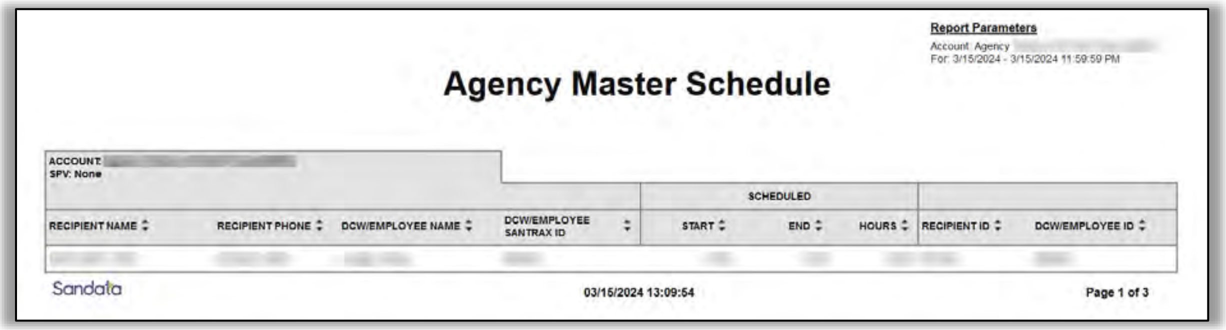
Active DCW/Employee Report: This report displays all active DCW or Employees for the selected date. The report displays the DCW/Employee ID, DCW/Employee name, DCW/Employee email address, phone number, and Santrax ID.

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



Agency Master Schedule: This report provides a comprehensive list of all scheduled visits for the selected date.

Use this report to list all scheduled visits with a start date that falls on the selected date.



Report Parameters
Account: Agency
For: 3/15/2024 - 3/15/2024 11:59:59 PM

Agency Master Schedule

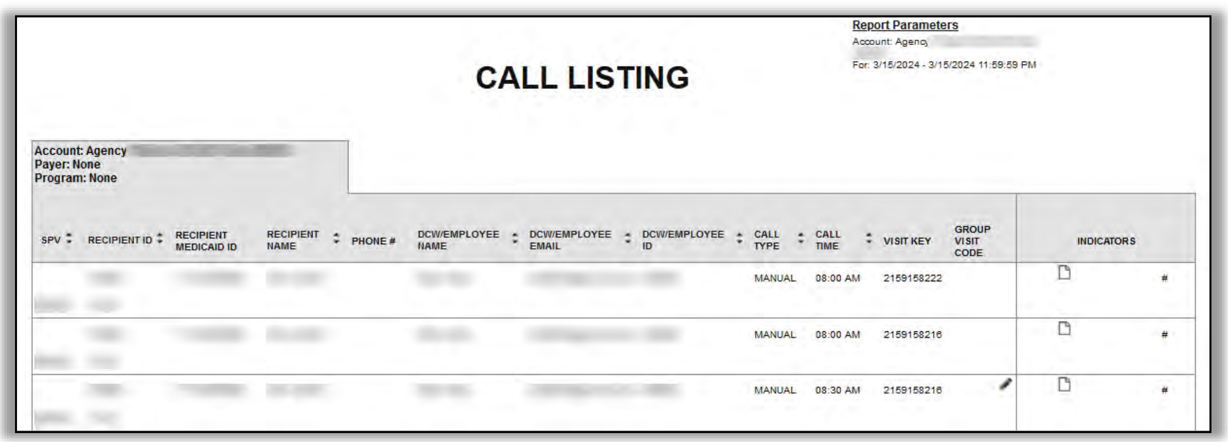
ACCOUNT:
SPV: None

RECIPIENT NAME	RECIPIENT PHONE	DCW/EMPLOYEE NAME	DCW/EMPLOYEE SANTRAX ID	SCHEDULED START	SCHEDULED END	SCHEDULED HOURS	RECIPIENT ID	DCW/EMPLOYEE ID

Sandata 03/15/2024 13:09:54 Page 1 of 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 calls that require editing, verification, or exception handling.



Report Parameters
Account: Agency
For: 3/15/2024 - 3/15/2024 11:59:59 PM

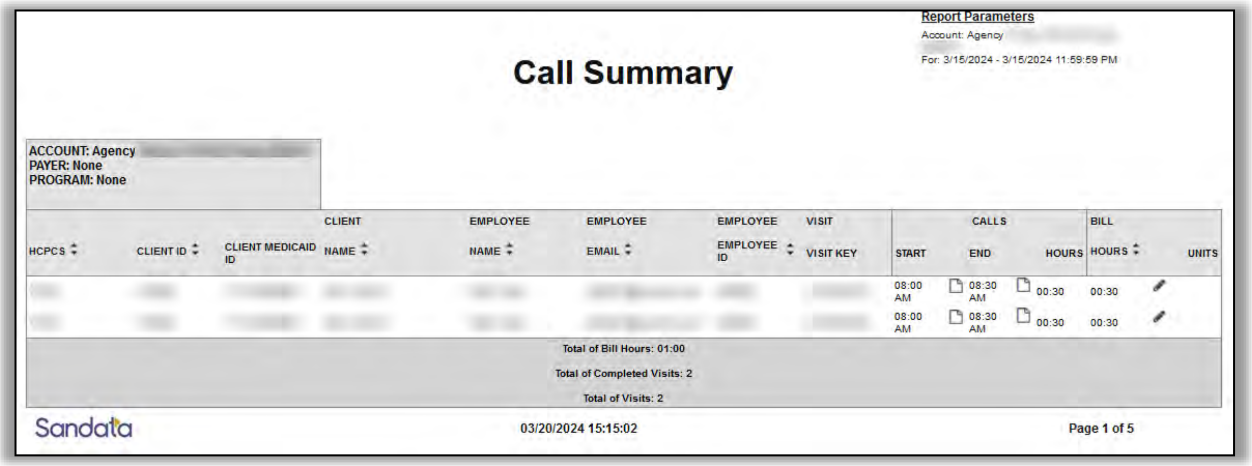
CALL LISTING

Account: Agency
Payer: None
Program: None

SPV	RECIPIENT ID	RECIPIENT MEDICAID ID	RECIPIENT NAME	PHONE #	DCW/EMPLOYEE NAME	DCW/EMPLOYEE EMAIL	DCW/EMPLOYEE ID	CALL TYPE	CALL TIME	VISIT KEY	GROUP VISIT CODE	INDICATORS
								MANUAL	08:00 AM	2159158222		#
								MANUAL	08:00 AM	2159158216		#
								MANUAL	08:30 AM	2159158216		#

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

Use this report to review current visit information daily 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.



Report Parameters
Account: Agency [illegible]
For: 3/15/2024 - 3/15/2024 11:59:59 PM

Call Summary

ACCOUNT: Agency [illegible]
PAYER: None
PROGRAM: None

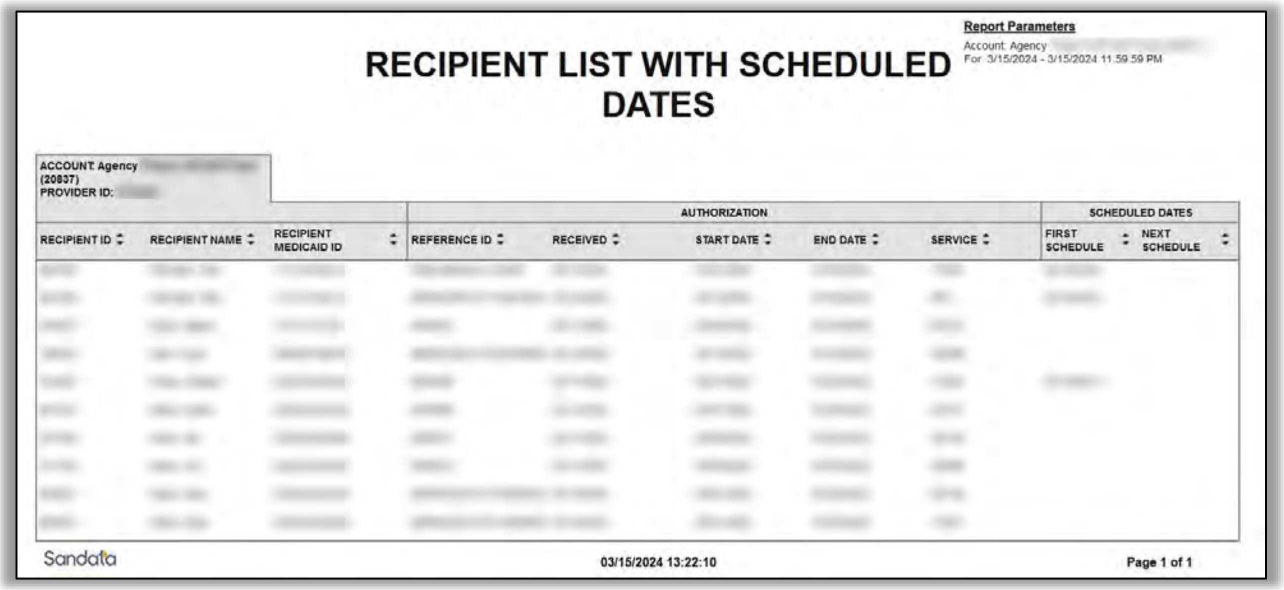
HCPCS	CLIENT ID	CLIENT MEDICAID ID	CLIENT NAME	EMPLOYEE NAME	EMPLOYEE EMAIL	EMPLOYEE ID	VISIT KEY	CALLS START	CALLS END	CALLS HOURS	BILL HOURS	UNITS
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	08:00 AM	08:30 AM	00:30	00:30	
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	08:00 AM	08:30 AM	00:30	00:30	

Total of Bill Hours: 01:00
Total of Completed Visits: 2
Total of Visits: 2

Sandata 03/20/2024 15:15:02 Page 1 of 5

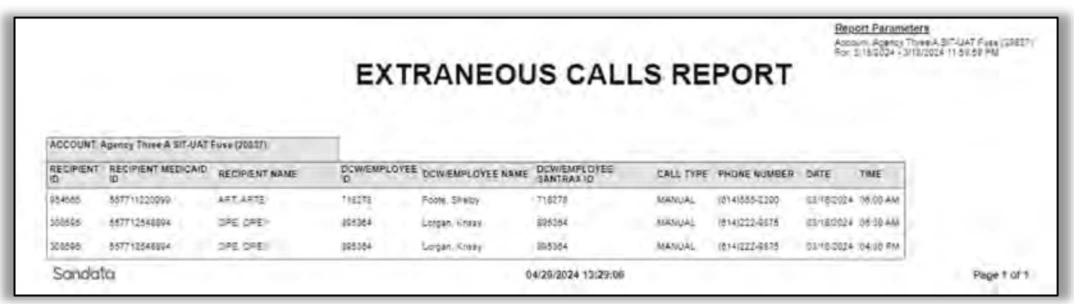
Recipient List with Scheduled Dates Report: This report shows a list of all Recipients with schedules. The report displays authorization information and the dates for the Recipient's first and next schedule.

Use this report to review the responsiveness to Recipient needs. Authorization information is displayed, including the date the authorization was received, and the authorization's start date. This information can identify patterns in how authorizations are issued, for example, extended periods of time from date the authorization was received and the first date of service. The date service was first provided as well as the next scheduled date are displayed to ensure services for active authorizations are ongoing.



			AUTHORIZATION					SCHEDULED DATES	
RECIPIENT ID	RECIPIENT NAME	RECIPIENT MEDICAID ID	REFERENCE ID	RECEIVED	START DATE	END DATE	SERVICE	FIRST SCHEDULE	NEXT SCHEDULE

Extraneous Calls Report: This report identifies interim calls (calls that are neither in-calls or out calls) associated with a visit.

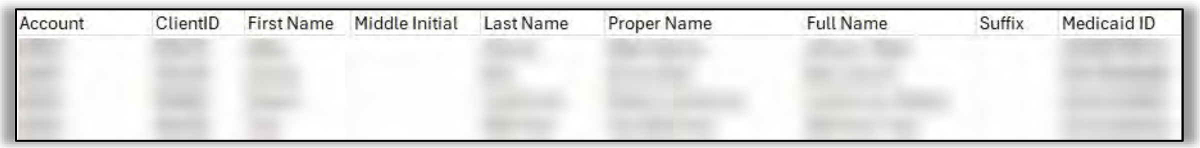


RECIPIENT ID	RECIPIENT MEDICAID ID	RECIPIENT NAME	DCW/EMPLOYEE ID	DCW/EMPLOYEE NAME	DCW/EMPLOYEE SANTRAX ID	CALL TYPE	PHONE NUMBER	DATE	TIME
954666	557711220099	ART, ARTE	718278	Foote, Shelby	718278	MANUAL	(814)555-2200	03/18/2024	06:00 AM
308696	557712548894	OPE, OPEI	895364	Lorgan, Krissy	895364	MANUAL	(814)222-9875	03/18/2024	06:30 AM
308696	557712548894	OPE, OPEI	895364	Lorgan, Krissy	895364	MANUAL	(814)222-9875	03/18/2024	04:00 PM

Full Recipient Export: This export produces an Excel spreadsheet with all matching Recipient data. This includes all details about Recipients including account, first and last name, Medicaid ID, email address, Social Security Number (SSN), Date of Birth (DOB), addresses, email address, phone numbers, designees, and emergency contacts.

Use this report to create an easily sortable list of Recipients. This information can be used to populate a third-party database including agency management systems.

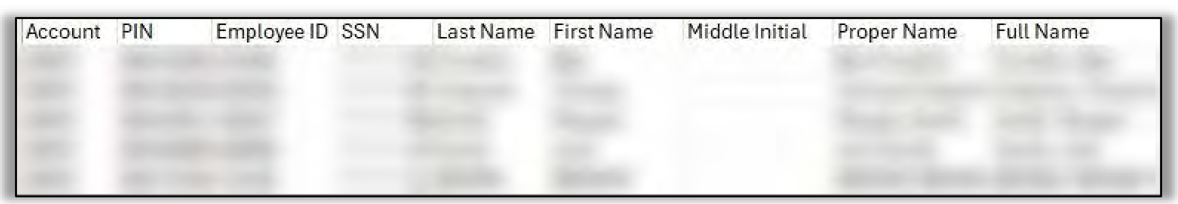
> **NOTE:** This example is a partial screenshot due to the number of fields. Complete an export to find names of all fields.



Full DCW/Employee Export: This export produces an Excel spreadsheet with all matching DCW/Employee data. This includes all details about the DCWs or Employees including account, PIN, DCW/Employee ID, SSN, first and last name, middle initial, email address, DOB, address, email address, department, type, discipline, manager email, Application Programming Interface (API), National Provider Identifier (NPI), phone number, hire date, termination date, and gender. Only fields that include data will be included in the export.

Use this report to create an easily sortable list of DCW or Employees. This information can be used to populate a third-party database including agency management systems and payroll systems.

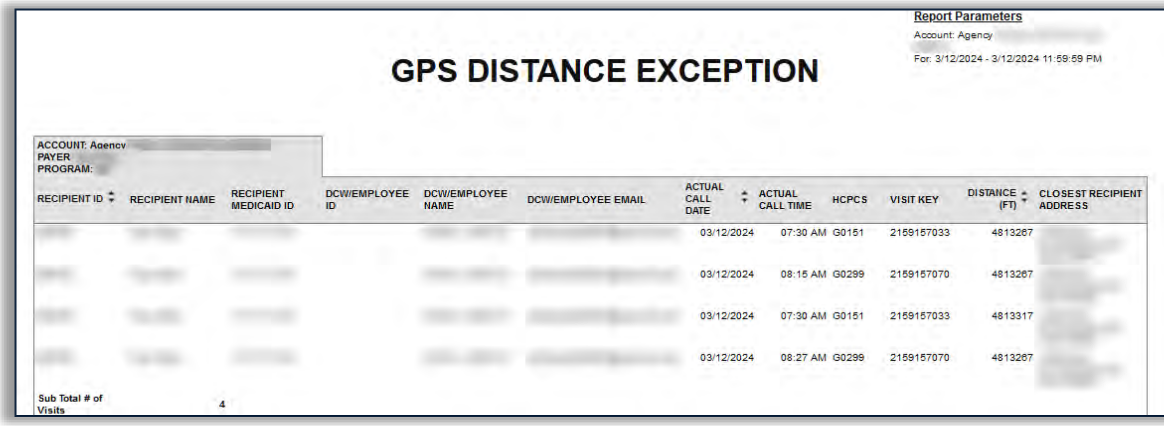
> **NOTE:** This example is a partial screenshot due to the number of fields. Complete an export to find names of all fields.



GPS Distance Exception Report: This report shows mobile calls that were made from a location that Is more than the threshold set in feet from any known Recipient address.

Use this report to review calls that were made outside of the expected distance tolerance from a Recipient address. The report captures the

Recipient, DCW/Employee, visit date, call time, service, and closest Recipient address.



Report Parameters
Account: Agency [illegible]
For: 3/12/2024 - 3/12/2024 11:59:59 PM

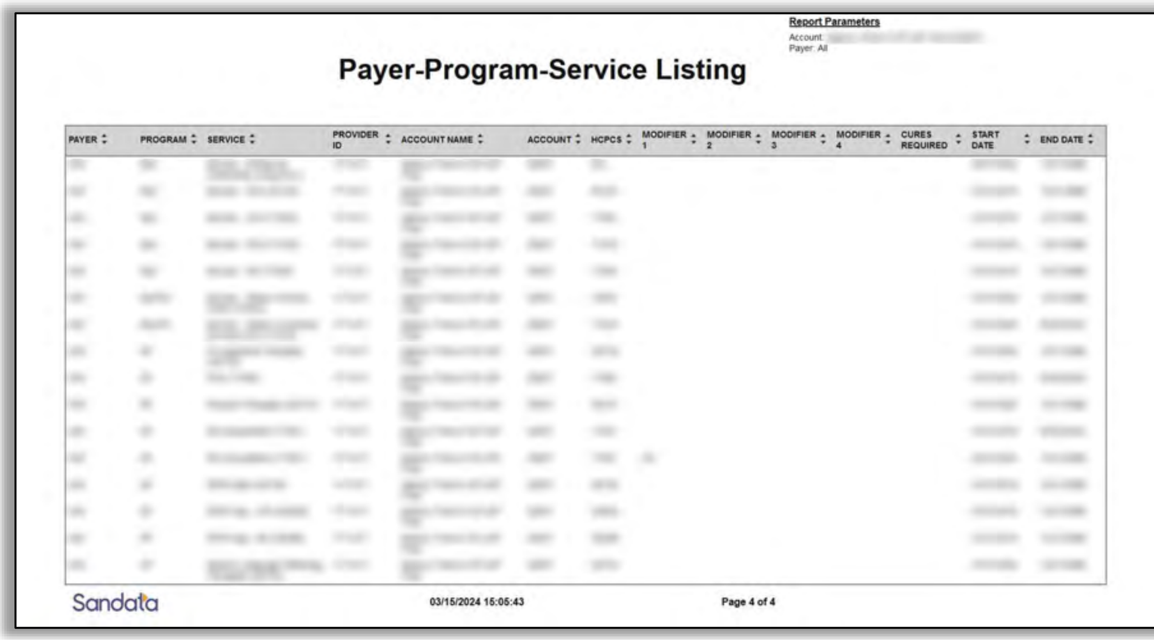
GPS DISTANCE EXCEPTION

ACCOUNT: Agency [illegible]
PAYER [illegible]
PROGRAM: [illegible]

RECIPIENT ID	RECIPIENT NAME	RECIPIENT MEDICAID ID	DCW/EMPLOYEE ID	DCW/EMPLOYEE NAME	DCW/EMPLOYEE EMAIL	ACTUAL CALL DATE	ACTUAL CALL TIME	HCPCS	VISIT KEY	DISTANCE (FT)	CLOSEST RECIPIENT ADDRESS
[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	03/12/2024	07:30 AM	G0151	2159157033	4813267	[illegible]
[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	03/12/2024	08:15 AM	G0299	2159157070	4813267	[illegible]
[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	03/12/2024	07:30 AM	G0151	2159157033	4813317	[illegible]
[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	03/12/2024	08:27 AM	G0299	2159157070	4813267	[illegible]
Sub Total # of Visits		4									

Payer-Program-Service Listing Report: This report shows the payer, program, and service hierarchy for the account.

Use this report to review the payer, program, and service hierarchy, the start and end dates for services, and any modifiers applied to services. The report can assist providers in reviewing the payer configuration for the program.



Report Parameters
Account: [illegible]
Payer: All

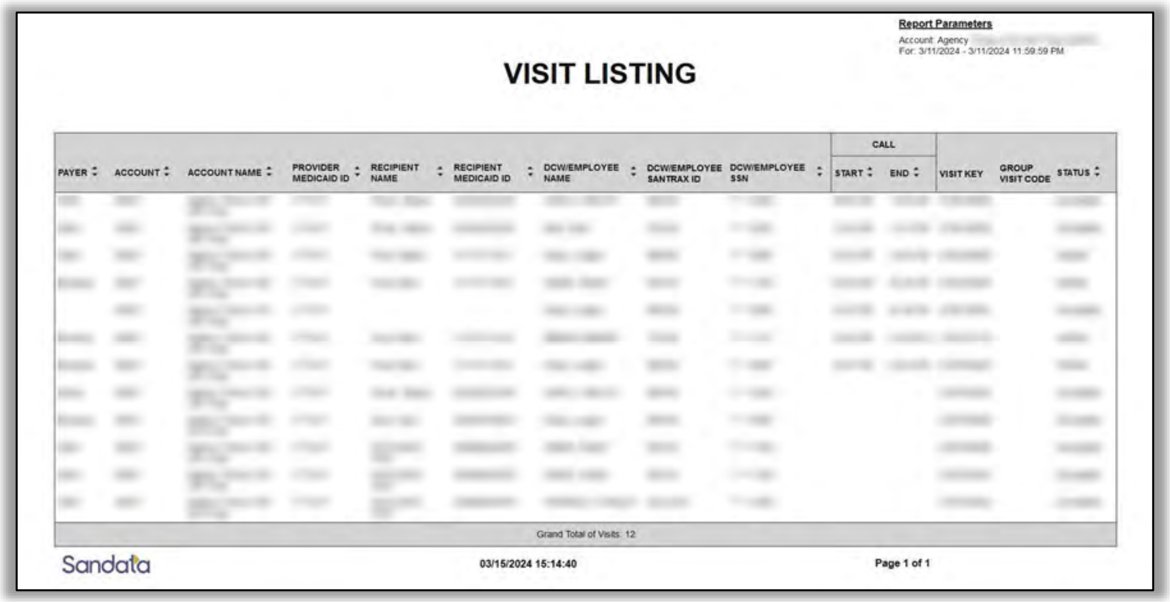
Payer-Program-Service Listing

PAYER	PROGRAM	SERVICE	PROVIDER ID	ACCOUNT NAME	ACCOUNT	HCPCS	MODIFIER 1	MODIFIER 2	MODIFIER 3	MODIFIER 4	CURES REQUIRED	START DATE	END DATE
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]					[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]						[illegible]	[illegible]

Sandata 03/15/2024 15:05:43 Page 4 of 4

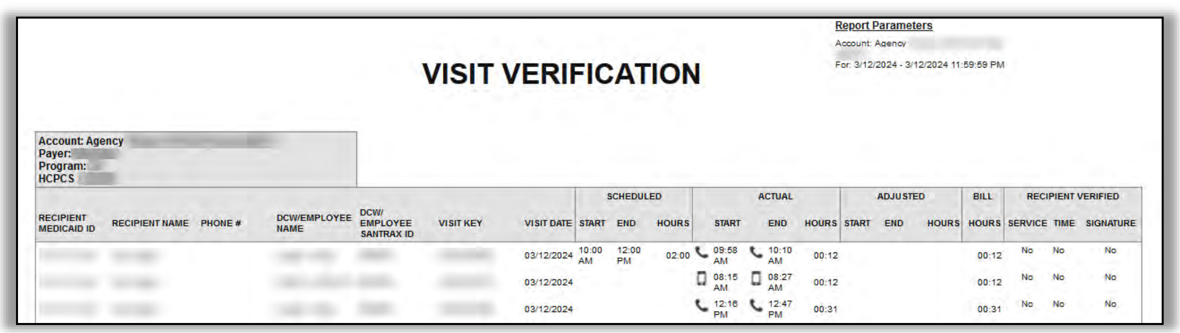
Visit Listing Report: This report displays all actual calls for all visits for the selected day. It allows the user to perform further analytics on activity.

Use this report to view all visits for the selected day and review the visit status and call in/out times in one report.



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

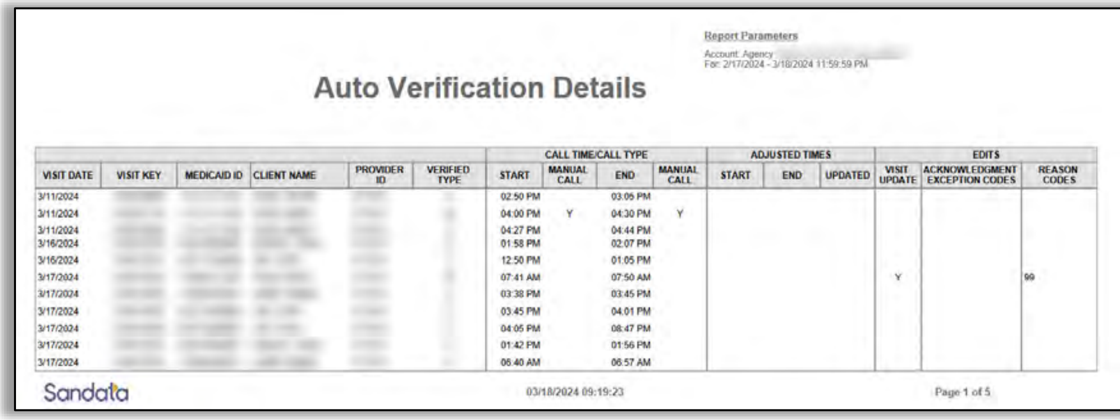
Use this report to see all information about a visit including additional information that is not visible directly on the visit line in Visit Maintenance.



Date Range Report Library

Auto Verification Detail Report: This report displays all visits for the selected date range and shows how they were confirmed (manually or automatically) as well as details about any manual edits made to the visit.

Use this report to show visit verification activity details to enhance program compliance.



Report Parameters
Account: Agency
For: 2/17/2024 - 3/18/2024 11:59:59 PM

Auto Verification Details

						CALL TIME/CALL TYPE				ADJUSTED TIMES			EDITS		
VISIT DATE	VISIT KEY	MEDICAID ID	CLIENT NAME	PROVIDER ID	VERIFIED TYPE	START	MANUAL CALL	END	MANUAL CALL	START	END	UPDATED	VISIT UPDATE	ACKNOWLEDGMENT EXCEPTION CODES	REASON CODES
3/11/2024						02:50 PM		03:05 PM							
3/11/2024						04:00 PM	Y	04:30 PM	Y						
3/11/2024						04:27 PM		04:44 PM							
3/16/2024						01:58 PM		02:07 PM							
3/16/2024						12:50 PM		01:05 PM							
3/17/2024						07:41 AM		07:50 AM					Y		99
3/17/2024						03:38 PM		03:45 PM							
3/17/2024						03:45 PM		04:01 PM							
3/17/2024						04:05 PM		08:47 PM							
3/17/2024						01:42 PM		01:56 PM							
3/17/2024						06:40 AM		06:57 AM							

Sandata 03/18/2024 09:19:23 Page 1 of 5

Auto Verification Summary Report: This report displays verification statistics for each provider agency for the selected date range.

Use this report for an overview of the agency's overall program compliance.

Report Parameters
Account: Agency [illegible]
For: 2/17/2024 - 3/18/2024 11:59:59 PM

Auto Verification Summary

			VERIFIED VISITS				NON VERIFIED VISITS				WITH MANUAL UPDATES						ALL VISITS			
ACCOUNT	ACCOUNT NAME	PROVIDER ID	AUTO	%	MANUAL	%	IN-COMPLETE	%	OMIT	%	MANUAL CALLS	%	MANUAL EDITS	%	ADJ. VISITS	%	VERIFIED VISITS	%	NON VERIFIED VISITS	%
[illegible]	[illegible]	[illegible]	25	53.2	22	46.8	66	58.4	0	0.0	14	63.6	9	40.9	0	0	47	41.6	66	58.4
	Grand Totals:		25		22		66		0		14		9		0		47		66	

**The values in "WITH MANUAL UPDATES" section can overlap. This means that a visit can belong to more than one group.
The percentage is based on all visits that were manually verified.

Sandata 03/18/2024 09:32:53 Page 1 of 1

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

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

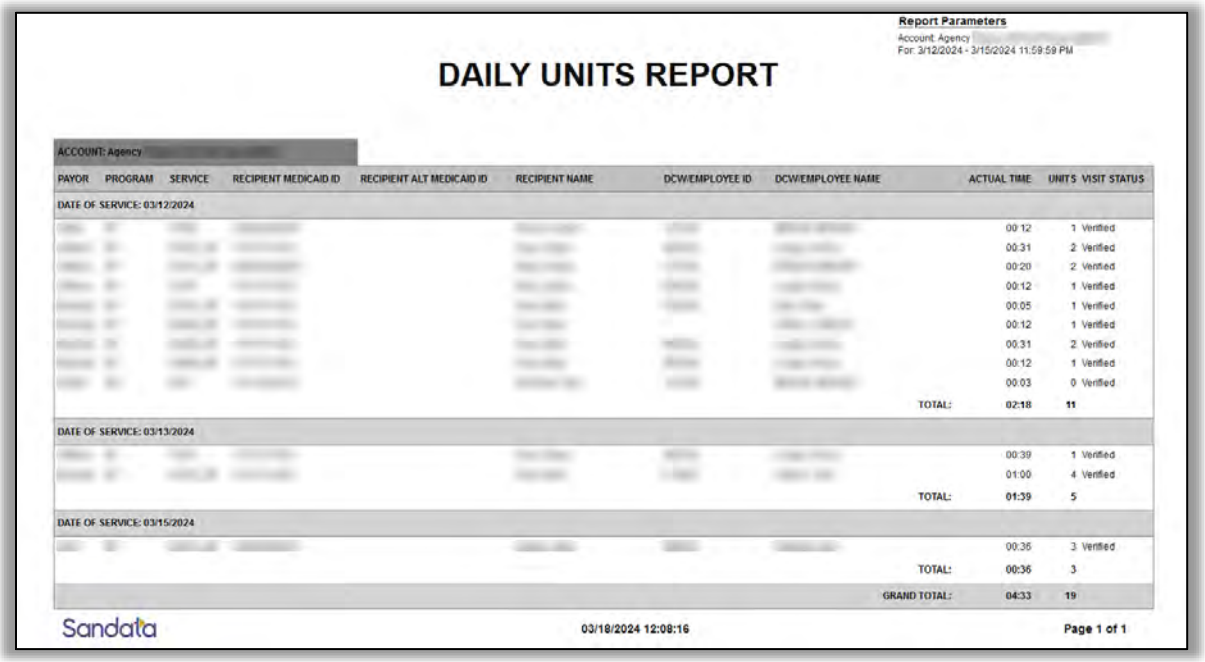
Report Parameters
Account: Agency [illegible]
For: 1/1/2024 - 3/14/2024 11:59:59 PM

RECIPIENT VISIT SUMMARY

Account: [illegible]
Payer: [illegible]
SPV: None
Recipient Id: [illegible]
Recipient Medicaid Id: [illegible]
Recipient Name: [illegible]

PROGRAM	HCPCS	DCW/EMPLOYEE ID	DCW/EMPLOYEE EMAIL	DCW/EMPLOYEE NAME	VISIT KEY	VISIT DATE	# OF VISITS	HOURS	HOURS OMITTED
SP	G0151	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]		00:30	
SP	G0151	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]		00:30	
SP	G0299	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]		00:17	
						Recipient/Date Sub-Total:	3	01:17	

Daily Units Report: Summary of units per payer/program/service, Recipient, caregiver, date, total actual time (adjusted if it exists, otherwise actual), total units.



Report Parameters
Account: Agency [illegible]
For: 3/12/2024 - 3/15/2024 11:59:59 PM

DAILY UNITS REPORT

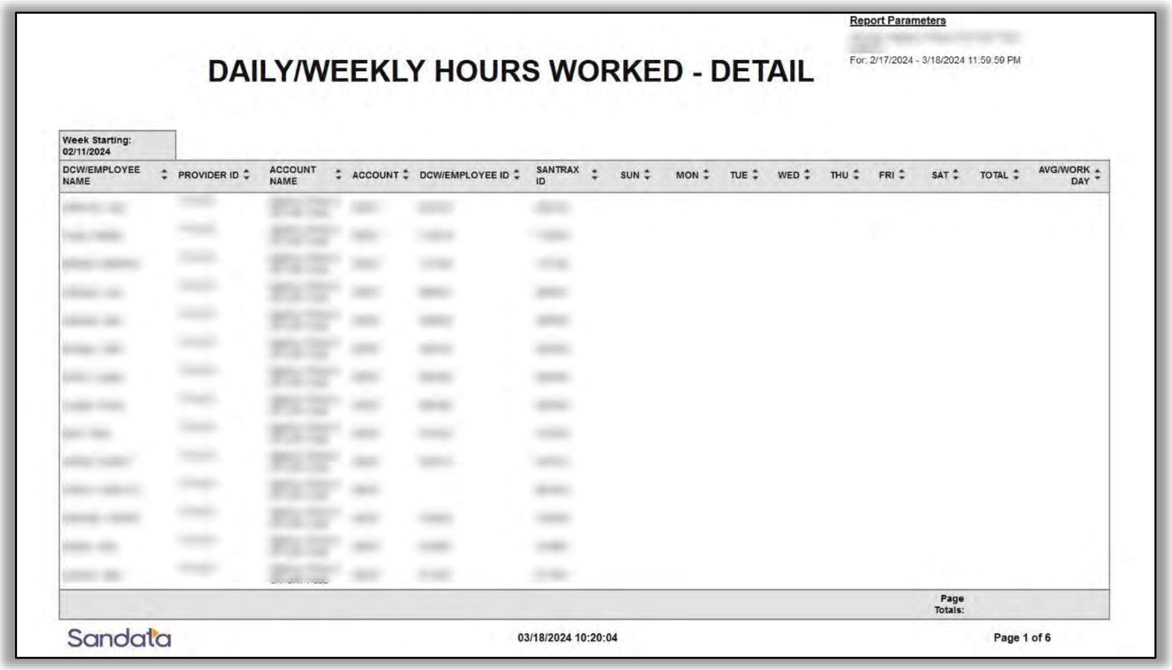
ACCOUNT: Agency [illegible]

PAYOR	PROGRAM	SERVICE	RECIPIENT MEDICAID ID	RECIPIENT ALT MEDICAID ID	RECIPIENT NAME	DCW/EMPLOYEE ID	DCW/EMPLOYEE NAME	ACTUAL TIME	UNITS	VISIT STATUS
DATE OF SERVICE: 03/12/2024										
[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	00:12	1	Verified
[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	00:31	2	Verified
[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	00:20	2	Verified
[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	00:12	1	Verified
[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	00:05	1	Verified
[illegible]	[illegible]	[illegible]	[illegible]		[illegible]		[illegible]	00:12	1	Verified
[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	00:31	2	Verified
[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	00:12	1	Verified
[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	00:03	0	Verified
							TOTAL:	02:18	11	
DATE OF SERVICE: 03/13/2024										
[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	00:39	1	Verified
[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	01:00	4	Verified
							TOTAL:	01:39	5	
DATE OF SERVICE: 03/15/2024										
[illegible]	[illegible]	[illegible]	[illegible]		[illegible]	[illegible]	[illegible]	00:36	3	Verified
							TOTAL:	00:36	3	
							GRAND TOTAL:	04:33	19	

Sandata 03/18/2024 12:08:16 Page 1 of 1

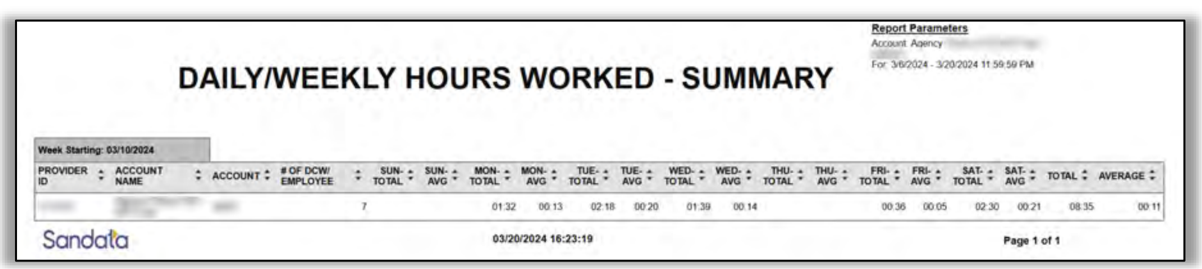
Daily / Weekly Hours Worked – Detail Report: This report displays a detailed view of the hours worked by each DCW or Employee for each agency, daily and weekly.

Use this report to view the total hours being worked per DCW or Employee. This information can be used to find discrepancies and trends. This report can also be used to identify workers who may be working more than a given number of hours per day or week.



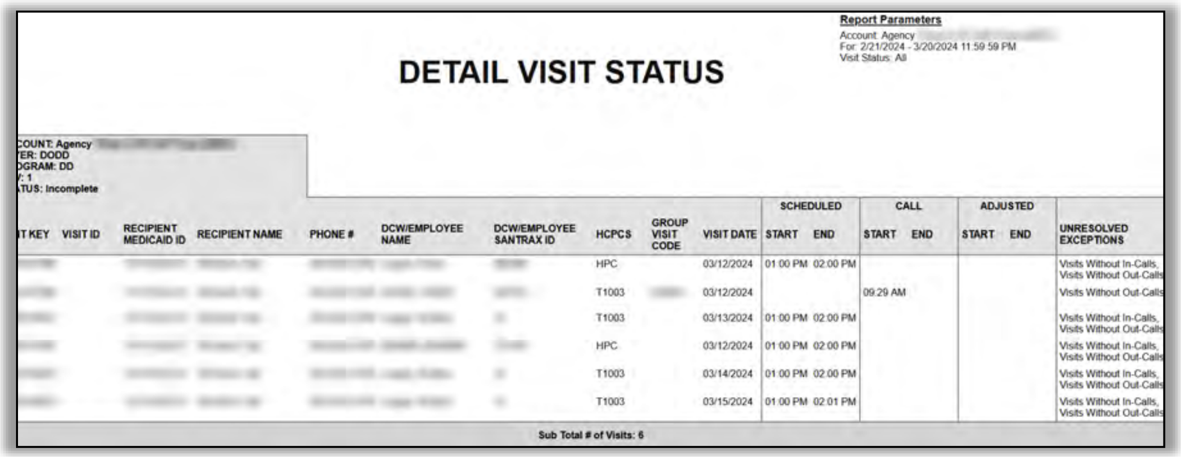
Daily / Weekly Hours Worked – Summary Report: This report displays the number of hours worked per DCW or Employee for the selected week.

Use this report to understand the total number of hours being worked in your agency and review the total number of DCW or Employee and the average hours worked per DCW or Employee. This information can be used to identify discrepancies and trends.



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 Recipient and DCW or 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 give 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 to get them to a verified status for claims validation.



Report Parameters
Account: Agency [illegible]
For: 2/21/2024 - 3/20/2024 11:59:59 PM
Visit Status: All

DETAIL VISIT STATUS

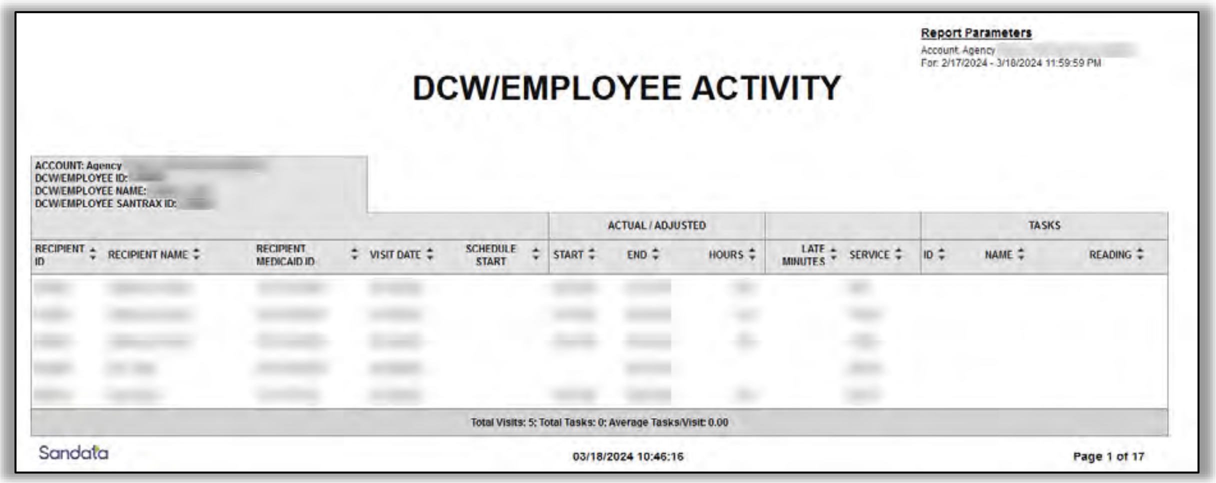
COUNT: Agency [illegible]
ER: DODD
OGRAM: DD
V: 1
ATUS: Incomplete

										SCHEDULED		CALL		ADJUSTED		
IT KEY	VISIT ID	RECIPIENT MEDICAID ID	RECIPIENT NAME	PHONE #	DCW/EMPLOYEE NAME	DCW/EMPLOYEE SANTRAX ID	HCPCS	GROUP VISIT CODE	VISIT DATE	START	END	START	END	START	END	UNRESOLVED EXCEPTIONS
[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	HPC		03/12/2024	01:00 PM	02:00 PM					Visits Without In-Calls, Visits Without Out-Calls
[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	T1003	[illegible]	03/12/2024			09:29 AM				Visits Without Out-Calls
[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	T1003		03/13/2024	01:00 PM	02:00 PM					Visits Without In-Calls, Visits Without Out-Calls
[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	HPC		03/12/2024	01:00 PM	02:00 PM					Visits Without In-Calls, Visits Without Out-Calls
[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	T1003		03/14/2024	01:00 PM	02:00 PM					Visits Without In-Calls, Visits Without Out-Calls
[illegible]		[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	T1003		03/15/2024	01:00 PM	02:01 PM					Visits Without In-Calls, Visits Without Out-Calls

Sub Total # of Visits: 6

DCW/Employee Activity Report: This report shows visit activity for each DCW or Employee with each DCW or Employee's information displayed on its own page. The report displays information about visits performed by the DCW or Employee for the selected date range.

Use this report to review visit activity by DCW or Employee. The report shows the detailed DCW or Employee visit history. It can be used to monitor DCW or Employee trends for late visits and tasks being performed. Times shown for the visit are based on the final visit times, using actual times or adjusted times if any adjustments occurred.


Report Parameters
Account: Agency
For: 2/17/2024 - 3/18/2024 11:59:59 PM

DCW/EMPLOYEE ACTIVITY

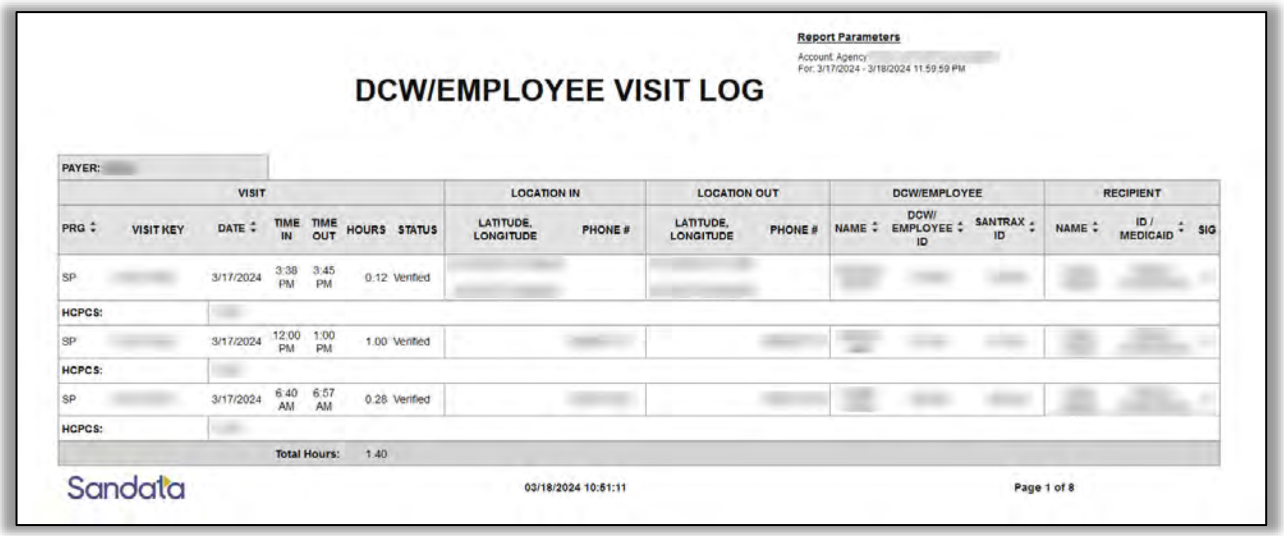
ACCOUNT: Agency
DCW/EMPLOYEE ID:
DCW/EMPLOYEE NAME:
DCW/EMPLOYEE SANTRAX ID:

					ACTUAL / ADJUSTED					TASKS		
RECIPIENT ID	RECIPIENT NAME	RECIPIENT MEDICAID ID	VISIT DATE	SCHEDULE START	START	END	HOURS	LATE MINUTES	SERVICE	ID	NAME	READING
Total Visits: 5; Total Tasks: 0; Average Tasks/Visit: 0.00												

Sandata 03/18/2024 10:46:16 Page 1 of 17

DCW/Employee Visit Log Report: This report shows a log of all visit activities for DCWs or Employees. The report displays information about the visit, DCW or Employee, and Recipient. Each payer receives their own page.

Use this report to view detailed information about the visit. This report includes standard visit information, as well as the status of the visit, the location of the visit, any visit notes entered using a mobile device and tasks. This report can be exported to excel to allow for sorting and filtering. Schedules are not shown in this report.



Report Parameters
Account Agency
For: 3/17/2024 - 3/18/2024 11:59:59 PM

DCW/EMPLOYEE VISIT LOG

PAYER:

VISIT							LOCATION IN		LOCATION OUT		DCW/EMPLOYEE			RECIPIENT		
PRG	VISIT KEY	DATE	TIME IN	TIME OUT	HOURS	STATUS	LATITUDE, LONGITUDE	PHONE #	LATITUDE, LONGITUDE	PHONE #	NAME	DCW/ EMPLOYEE ID	SANTRAX ID	NAME	ID / MEDICAID	SIG
SP		3/17/2024	3:38 PM	3:45 PM	0.12	Verified										
HCPCS:																
SP		3/17/2024	12:00 PM	1:00 PM	1.00	Verified										
HCPCS:																
SP		3/17/2024	6:40 AM	6:57 AM	0.28	Verified										
HCPCS:																
		Total Hours:			1.40											

Sandata 03/18/2024 10:51:11 Page 1 of 8

EVV Compliance Report: This visit shows visits occurring within a selected date range and whether they were manually edited. The report shows the percentage of manual visits for the selected period.

Report Parameters
Account: Agency Three A SIT-UAT Fuse (20837)
For: 4/12/2024 - 4/26/2024 11:59:59 PM

EVV COMPLIANCE

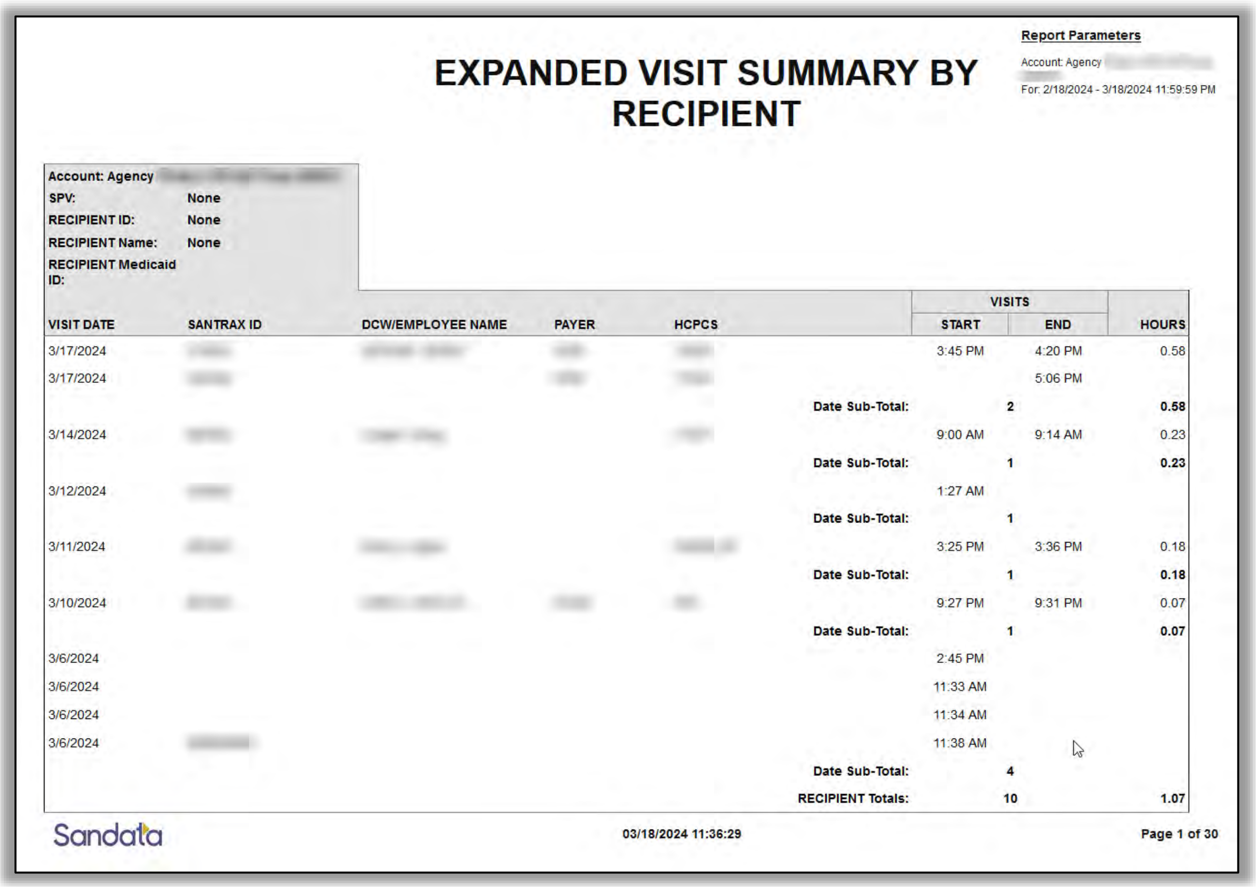
Account: Agency Three A SIT-UAT Fuse (20837)

VISIT		SCHEDULED		ACTUAL		RECIPIENT		DCW/EMPLOYEE	
DATE	VERIFICATION TYPE	START	END	START	END	MEDICAID ID	NAME	ID	NAME
04/12/2024	Auto	12:00 PM	04:00 PM	10:29 AM	12:00 PM	678909876543	Miller, Travis	909641	Webster, Lisa
04/14/2024	Manual			08:00 AM	08:00 AM	778877887788	Test, Maria	629149	Blum, Aaron
04/15/2024	Auto	12:00 PM	01:00 PM	02:26 PM	09:09 PM	678909876543	Miller, Travis	909641	Webster, Lisa
04/17/2024	Auto			08:54 AM	09:03 AM	448821345986	LOP, LOPPER	587813	SHADE, SHADY
04/17/2024	Manual			10:09 AM	10:18 AM	555738264966	Bull, Elaine	587813	SHADE, SHADY
04/17/2024	Auto			01:13 PM	01:25 PM	771122559900	NAN, NANCY	131002	Franklin, Ben
04/17/2024	Auto	02:00 PM	03:00 PM	02:02 PM	03:29 PM	121212121212	Logan, Adam	909641	Webster, Lisa
04/17/2024	Manual			07:00 AM	07:30 AM	559912467589	YOP, YOPPER	172182	BRAWN, BRAWNY
04/18/2024	Auto			11:43 AM	12:07 PM	456578453212	BABE, BABY	587813	SHADE, SHADY
04/18/2024	Auto	01:00 PM	02:00 PM	03:09 PM	04:06 PM	678909876543	Miller, Travis	909641	Webster, Lisa
04/22/2024	Auto	10:00 PM	03:00 PM	10:22 AM	05:59 PM	678909876543	Miller, Travis	909641	Webster, Lisa
04/23/2024	Auto	03:00 PM	03:30 PM	03:00 PM	04:59 PM	121212121212	Logan, Adam	909641	Webster, Lisa
04/23/2024	Auto	10:00 PM	03:00 PM	11:42 AM	01:56 PM	678909876543	Miller, Travis	909641	Webster, Lisa
04/23/2024	Manual	06:00 AM	05:00 PM	10:00 AM	03:54 PM	678909876543	Miller, Travis	820655	Winn, Bob
04/24/2024	Auto	10:00 AM	03:00 PM	10:58 AM	11:43 PM	678909876543	Miller, Travis	909641	Webster, Lisa
04/25/2024	Auto	10:00 AM	03:00 PM	01:44 PM	03:52 PM	678909876543	Miller, Travis	909641	Webster, Lisa
Total Account Visits: 16 Compliance Percentage: 75.00%					Total Account Visits Auto Verified: 12 75.00%			Total Account Visits Manually Verified: 4 25.00%	
Grand Total Account Visits: 16 Compliance Percentage: 75.00%					Grand Total Account Visits Auto Verified: 12 75.00%			Grand Total Account Visits Manually Verified: 4 25.00%	

Sandata 04/26/2024 14:13:02 Page 1 of 1

Expanded Visit Summary (Recipient) Report: This report shows an expanded summary of all visits for the selected date range. The report is broken out by Recipient, with each change in Recipient starting a new page. The visit dates, start/end times and other general information about the Recipient's visits are included. Subtotals are listed by date.

Use this report to review visit activity for Recipient over a selected date range. This report allows users to view Recipient activity across all workers.



Report Parameters

Account: Agency

For: 2/18/2024 - 3/18/2024 11:59:59 PM

EXPANDED VISIT SUMMARY BY RECIPIENT

Account: Agency

SPV: None

RECIPIENT ID: None

RECIPIENT Name: None

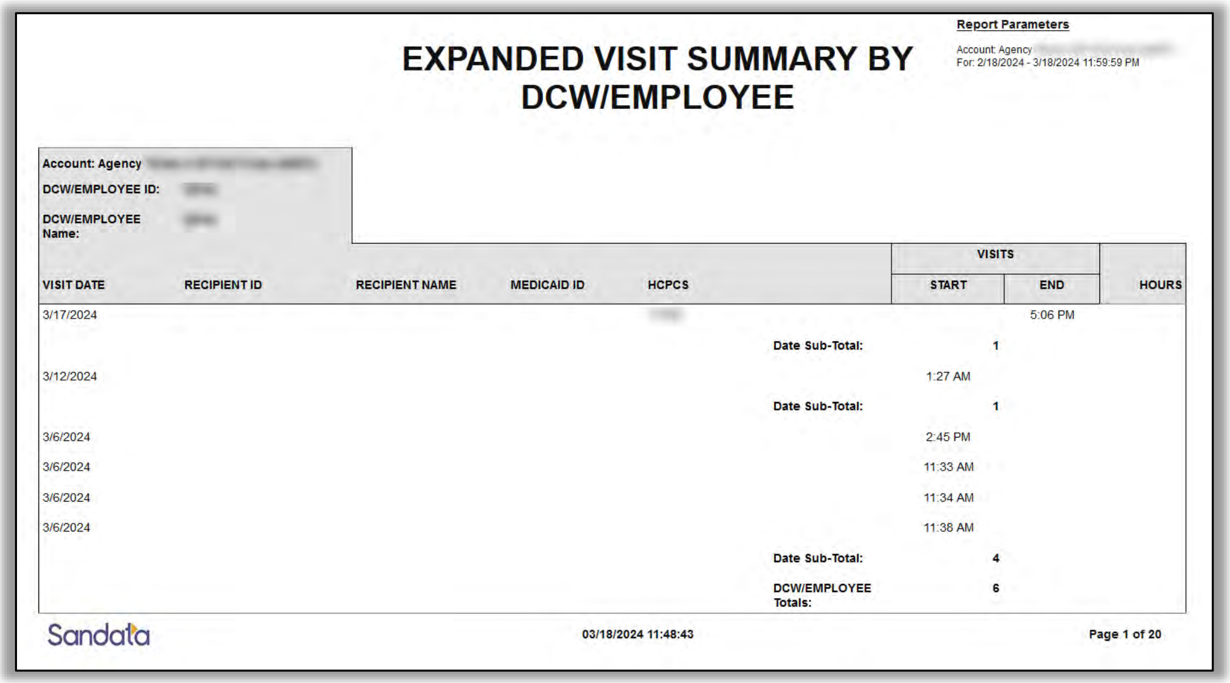
RECIPIENT Medicaid ID:

VISIT DATE	SANTRAX ID	DCW/EMPLOYEE NAME	PAYER	HCPCS		VISITS START	VISITS END	HOURS
3/17/2024						3:45 PM	4:20 PM	0.58
3/17/2024							5:06 PM	
					Date Sub-Total:	2		0.58
3/14/2024						9:00 AM	9:14 AM	0.23
					Date Sub-Total:	1		0.23
3/12/2024						1:27 AM		
					Date Sub-Total:	1		
3/11/2024						3:25 PM	3:36 PM	0.18
					Date Sub-Total:	1		0.18
3/10/2024						9:27 PM	9:31 PM	0.07
					Date Sub-Total:	1		0.07
3/6/2024						2:45 PM		
3/6/2024						11:33 AM		
3/6/2024						11:34 AM		
3/6/2024						11:38 AM		
					Date Sub-Total:	4		
					RECIPIENT Totals:	10		1.07

Sandata 03/18/2024 11:36:29 Page 1 of 30

Expanded Visit Summary (DCW/Employee) Report: This report shows an expanded view of all visits for the selected date range. The report is broken out by DCW or Employee, with each change in DCW or Employee starting a new page. The visit dates, start/end times and other general information about the DCW or Employee's visits are included.

Use this report to review all DCW or Employee activity to understand how many hours specific DCW or Employee are working.



Report Parameters
Account: Agency
For: 2/18/2024 - 3/18/2024 11:59:59 PM

EXPANDED VISIT SUMMARY BY DCW/EMPLOYEE

Account: Agency
DCW/EMPLOYEE ID:
DCW/EMPLOYEE Name:

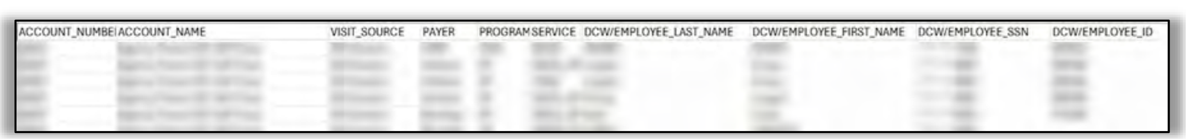
VISIT DATE	RECIPIENT ID	RECIPIENT NAME	MEDICAID ID	HCPCS		VISITS START	VISITS END	HOURS
3/17/2024							5:06 PM	
					Date Sub-Total:	1		
3/12/2024						1:27 AM		
					Date Sub-Total:	1		
3/6/2024						2:45 PM		
3/6/2024						11:33 AM		
3/6/2024						11:34 AM		
3/6/2024						11:38 AM		
					Date Sub-Total:	4		
					DCW/EMPLOYEE Totals:	6		

Sandata 03/18/2024 11:48:43 Page 1 of 20

Full Visit Export: This export produces an Excel spreadsheet that includes details for all visits that occurred within the selected date range. This includes all details about the visit including call in/call out times, exceptions, DCW or Employee and Recipient information, and other data points.

Use this export to create an easily sortable list of all visits that occurred within the selected date range. This information can also be used to populate a third-party data store including agency management systems, and payroll systems.

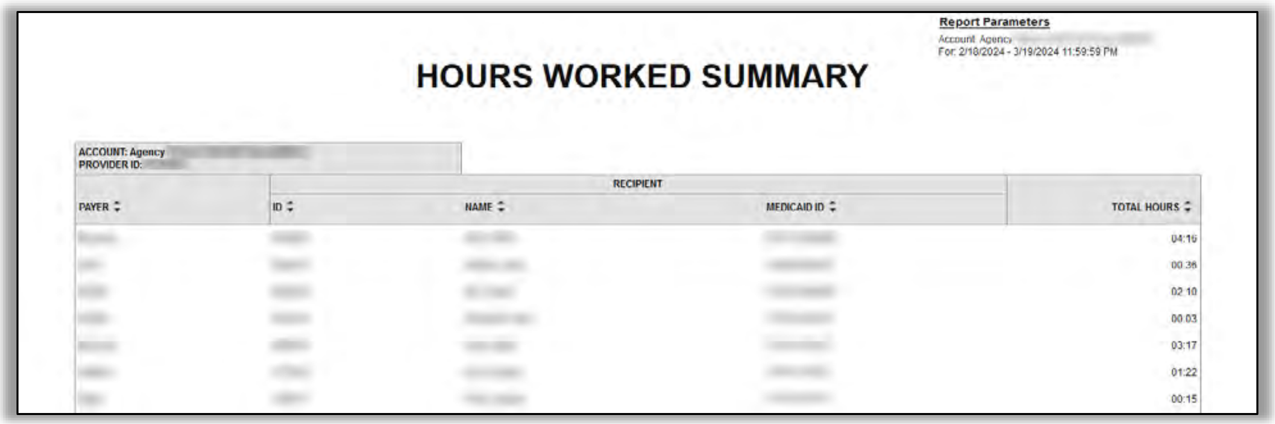
> **NOTE:** This example is a partial screenshot due to the number of fields. Complete an export to find names of all fields.



ACCOUNT_NUMBE	ACCOUNT_NAME	VISIT_SOURCE	PAYER	PROGRAM	SERVICE	DCW/EMPLOYEE_LAST_NAME	DCW/EMPLOYEE_FIRST_NAME	DCW/EMPLOYEE_SSN	DCW/EMPLOYEE_ID

Hours Worked Summary Report: This report shows a summary view of all hours worked by DCWs or Employees for the selected date range.

Use this report to review the amount of time being spent by field staff on visits. This report is limited to verified or processed visits and does not include visits which are still in process or that are flagged with exceptions.



Report Parameters
Account: Agency [illegible]
For: 2/18/2024 - 3/19/2024 11:59:59 PM

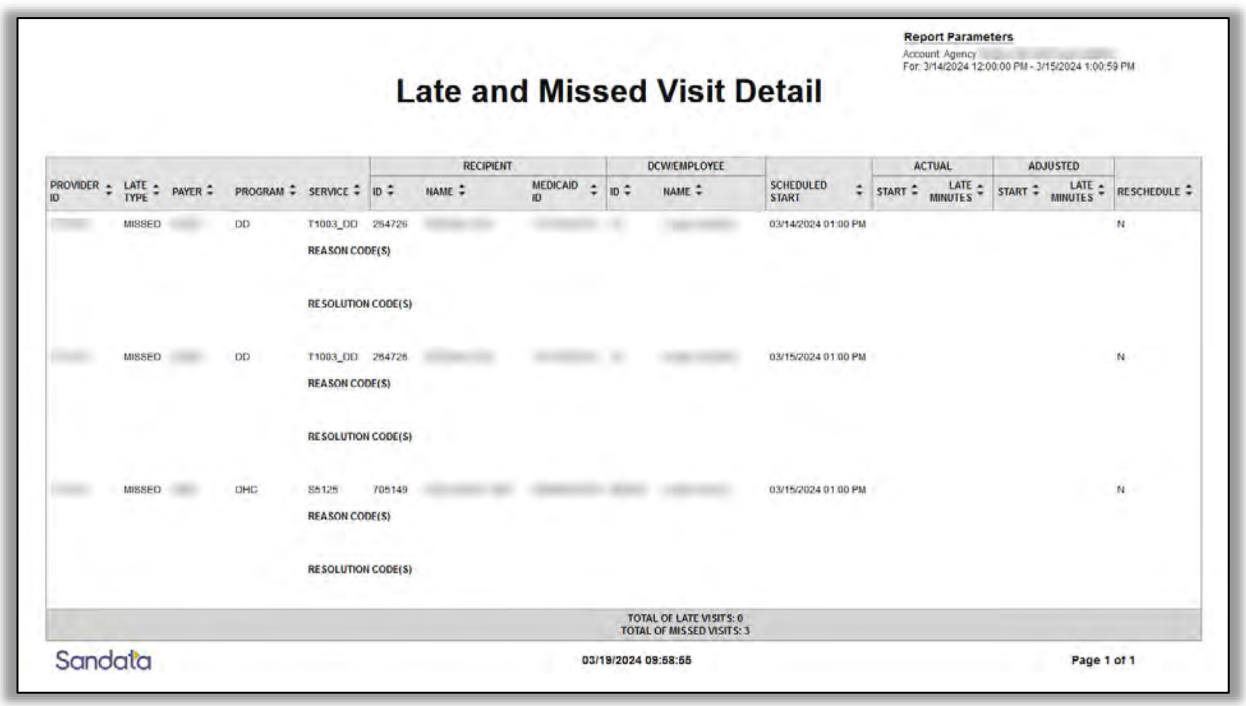
HOURS WORKED SUMMARY

ACCOUNT: Agency [illegible]
PROVIDER ID: [illegible]

	RECIPIENT			
PAYER	ID	NAME	MEDICAID ID	TOTAL HOURS
[illegible]	[illegible]	[illegible]	[illegible]	04:16
[illegible]	[illegible]	[illegible]	[illegible]	00:36
[illegible]	[illegible]	[illegible]	[illegible]	02:10
[illegible]	[illegible]	[illegible]	[illegible]	00:03
[illegible]	[illegible]	[illegible]	[illegible]	03:17
[illegible]	[illegible]	[illegible]	[illegible]	01:22
[illegible]	[illegible]	[illegible]	[illegible]	00:15

Late and Missed Visit Detail Report: This report displays a listing of all late or missed visits that occurred within the selected date range. The report shows whether the visit was late (the call in was received after the scheduled start time) or missed (no call in was received for the schedule). The report includes general information about the visit, including Recipient and DCW or Employee information. The scheduled start, actual and adjusted start times are also shown in this report as well as whether the visit was rescheduled.

Use this report to gauge schedule compliance. This report allows users to track both late and missed visits to ensure Recipients received care as scheduled. Users can also review actual recorded times versus the adjusted times entered to assist in determining if visits are regularly being adjusted to match the scheduled times.



Report Parameters
Account: Agency
For: 3/14/2024 12:00:00 PM - 3/15/2024 1:00:59 PM

Late and Missed Visit Detail

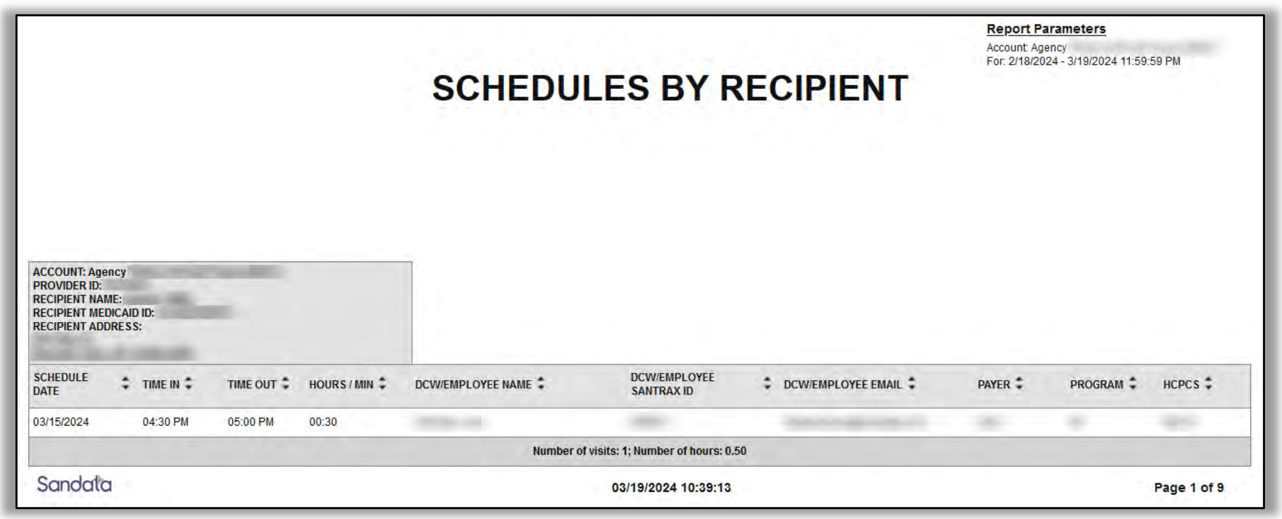
					RECIPIENT			DCW/EMPLOYEE			ACTUAL		ADJUSTED		
PROVIDER ID	LATE TYPE	PAYER	PROGRAM	SERVICE	ID	NAME	MEDICAID ID	ID	NAME	SCHEDULED START	START	LATE MINUTES	START	LATE MINUTES	RESCHEDULE
	MISSED		DD	T1003_DD	284726					03/14/2024 01:00 PM					N
				REASON CODE(S)											
				RESOLUTION CODE(S)											
	MISSED		DD	T1003_DD	284726					03/15/2024 01:00 PM					N
				REASON CODE(S)											
				RESOLUTION CODE(S)											
	MISSED		OHC	S5125	705149					03/15/2024 01:00 PM					N
				REASON CODE(S)											
				RESOLUTION CODE(S)											

TOTAL OF LATE VISITS: 0
TOTAL OF MISSED VISITS: 3

Sandata 03/19/2024 09:58:55 Page 1 of 1

Schedules by Recipient Report: This report shows all schedules for a selected date range. The report is grouped by Recipient with each Recipient receiving their own page. The report displays the DCW or Employee and Recipient's name and identification information, as well as the visit information.

Use this report to review and verify Recipient schedules for a selected date range. Users can print this report for a Recipient or designee review of upcoming schedules.



Report Parameters
Account: Agency
For: 2/18/2024 - 3/19/2024 11:59:59 PM

SCHEDULES BY RECIPIENT

ACCOUNT: Agency
PROVIDER ID:
RECIPIENT NAME:
RECIPIENT MEDICAID ID:
RECIPIENT ADDRESS:

SCHEDULE DATE	TIME IN	TIME OUT	HOURS / MIN	DCW/EMPLOYEE NAME	DCW/EMPLOYEE SANTRAX ID	DCW/EMPLOYEE EMAIL	PAYER	PROGRAM	HCPCS
03/15/2024	04:30 PM	05:00 PM	00:30						
Number of visits: 1; Number of hours: 0.50									

Sandata 03/19/2024 10:39:13 Page 1 of 9

Schedules by DCW/Employee Report: This report shows all schedules for a selected date range. The report is grouped by DCW/Employee with each DCW or Employee receiving their own page for easy distribution. The report displays the field staff and Recipient's name and identification information as well as the visit information.

Use this report to review and verify DCW or Employee schedules for a selected date range. This report can be provided in hard copy (or PDF) to the DCW or Employee, so they have information about upcoming schedules. This allows any changes to be made before visits.

Report Parameters
Account: Agency
For: 2/18/2024 - 3/19/2024 11:59:59 PM

SCHEDULES BY DCW/EMPLOYEE

ACCOUNT: Agency
PROVIDER ID:
DCW/EMPLOYEE NAME:
DCW/EMPLOYEE SANTRAX ID:
DCW/EMPLOYEE EMAIL:

SCHEDULE DATE	TIME IN	TIME OUT	HOURS / MIN	RECIPIENT NAME	RECIPIENT MEDICAID ID	RECIPIENT ADDRESS	PAYER	PROGRAM	SERVICE
03/12/2024	12:00 PM	12:30 PM	00:30						
03/12/2024	01:00 PM	02:00 PM	01:00						
03/12/2024	02:30 PM	03:00 PM	00:30						
03/13/2024	08:00 AM	08:30 AM	00:30						

Number of visits: 4; Number of hours: 2.50

Sandata **03/19/2024 10:47:45** **Page 1 of 7**

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

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

Report Parameters
Account: Agency
For: 2/18/2024 - 3/19/2024 11:59:59 PM

Summary Visit Status

ACCOUNT:
PAYER:
PROGRAM:

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

Sandata 03/19/2024 14:08:50 Page 1 of 14

Visit Capture Methodology Percentage Utilization Report: This report shows the percentage of calls captured by a method of visit verification used by an agency for a date range. The report displays the number of calls and what percentage of an agency's calls were captured using each method.

Use this report to review the visit capture methodology used for each call placed across all DCW or Employee for the agency.

Report Parameters
Account: Agency
For: 2/18/2024 - 3/19/2024 11:59:59 PM

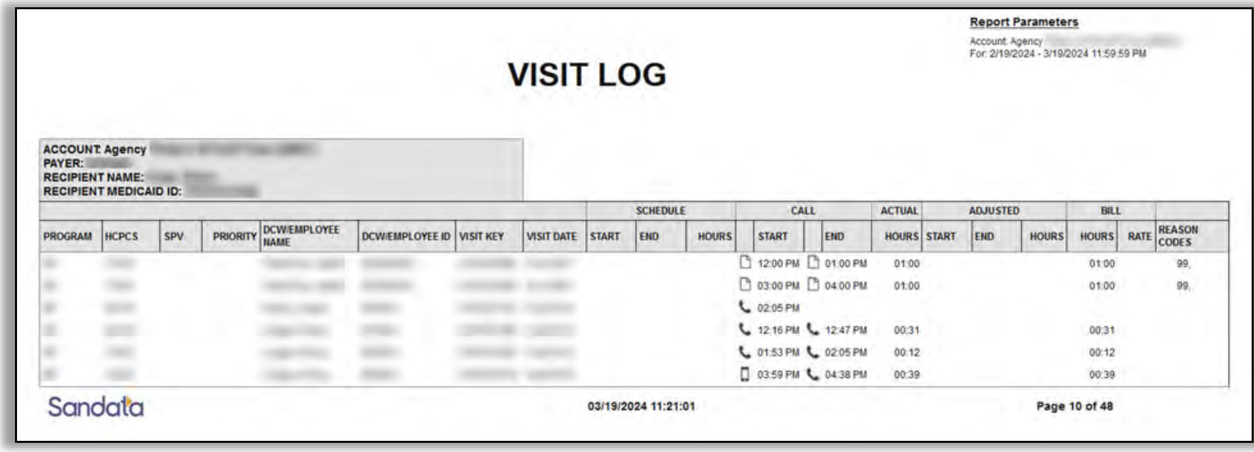
Visit Capture Methodology Percentage Utilization

			MOBILE		TELEPHONY		FVV		MANUAL		OTHER		TOTAL
ACCOUNT	ACCOUNT NAME	PROVIDER ID	# OF CALLS	%	# OF CALLS	%	# OF CALLS	%	# OF CALLS	%	# OF CALLS	%	# OF CALLS
		1771471	61	28.77%	38	17.92%	0	0.00%	113	53.30%	0	0.00%	212
		Grand Totals:	61		38		0		113		0		212

Sandata 03/19/2024 11:11:34 Page 1 of 1

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

Use this report to track Recipient visits by monitoring call times, bill information, and reason codes applied.



Report Parameters
Account: Agency
For: 2/19/2024 - 3/19/2024 11:59:59 PM

VISIT LOG

ACCOUNT: Agency
PAYER:
RECIPIENT NAME:
RECIPIENT MEDICAID ID:

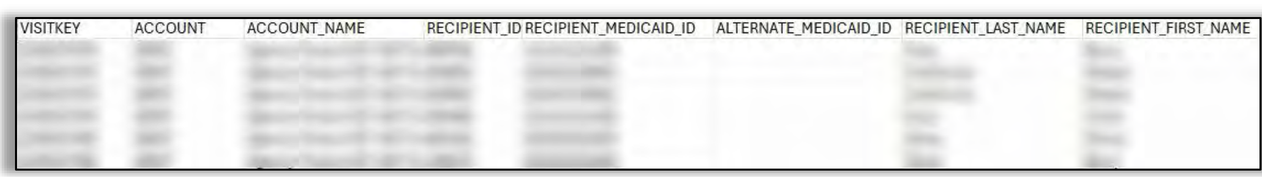
								SCHEDULE			CALL		ACTUAL	ADJUSTED			BILL		
PROGRAM	HCPCS	SPV	PRIORITY	DCW/EMPLOYEE NAME	DCW/EMPLOYEE ID	VISIT KEY	VISIT DATE	START	END	HOURS	START	END	HOURS	START	END	HOURS	HOURS	RATE	REASON CODES
											12:00 PM	01:00 PM	01:00				01:00		99,
											03:00 PM	04:00 PM	01:00				01:00		99,
											02:05 PM								
											12:16 PM	12:47 PM	00:31				00:31		
											01:53 PM	02:05 PM	00:12				00:12		
											03:59 PM	04:38 PM	00:39				00:39		

Sandata 03/19/2024 11:21:01 Page 10 of 48

Visit Verification Activity Log Report: This export includes all data for visits during the selected date range. The export focuses on changes made to visits and includes the Recipient name, DCW or Employee, call in and call out time, as well as additional visit information including scheduled visit times.

Use this report to review and verify visits that occurred for a selected date range.

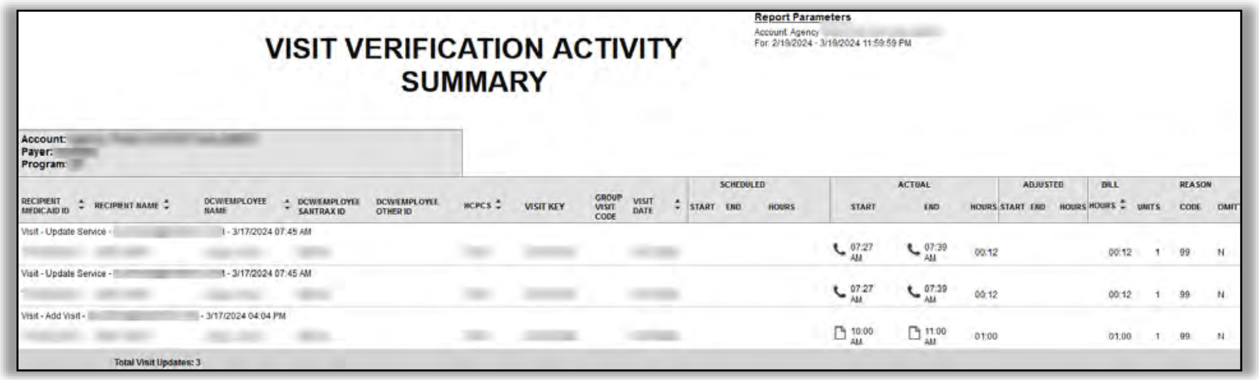
> **NOTE:** This example is a partial screenshot due to the number of fields. Complete an export to find names of all fields.



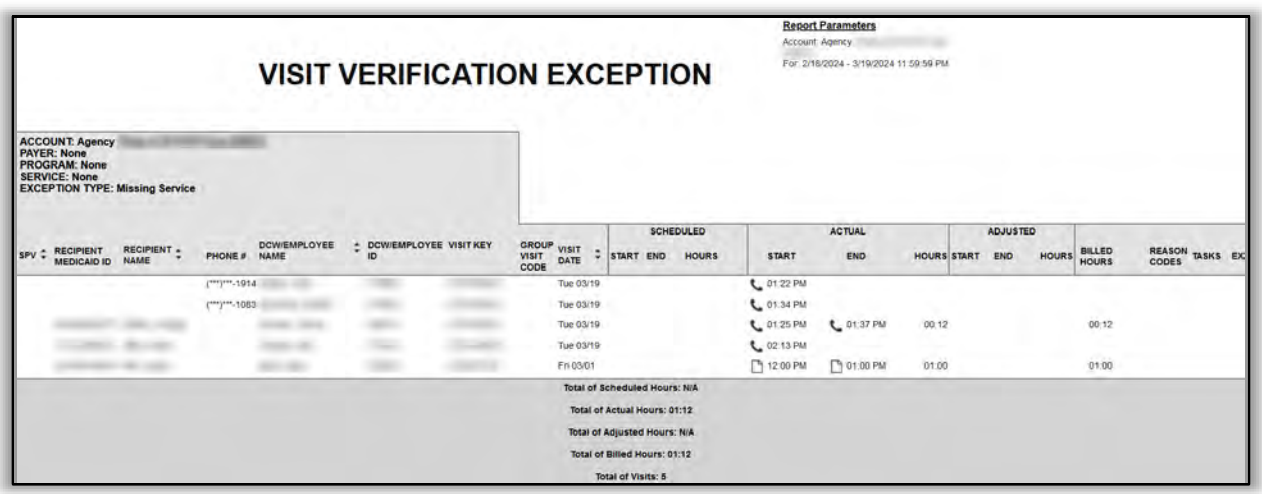
VISITKEY	ACCOUNT	ACCOUNT_NAME	RECIPIENT_ID	RECIPIENT_MEDICAID_ID	ALTERNATE_MEDICAID_ID	RECIPIENT_LAST_NAME	RECIPIENT_FIRST_NAME

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 the visit verification information and activity for a date range. It lists currently applied exceptions. Visits with multiple exceptions appear on multiple pages.



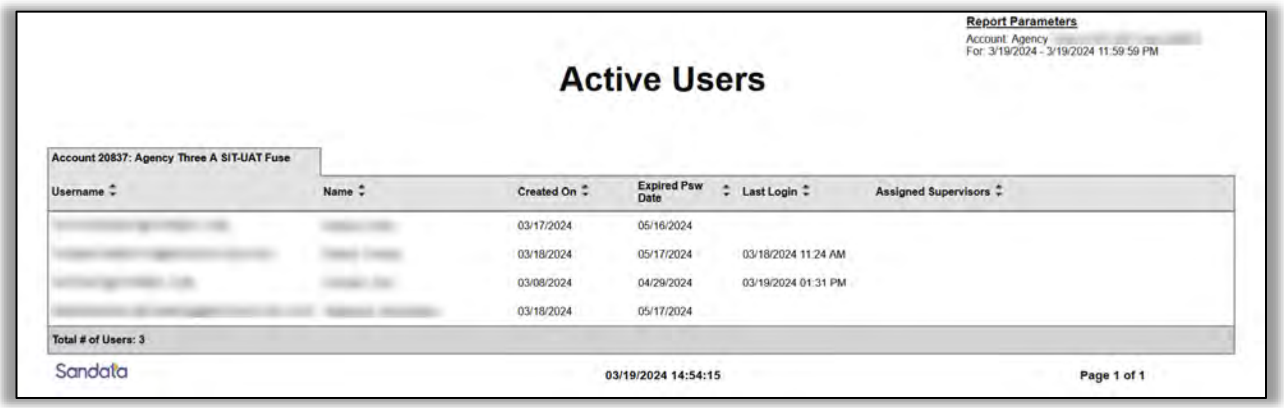
Visit Verification Exception Report: This report details the various exceptions found in Visit Maintenance and lists each exception type page by page with all applicable visits. Use this report to review needed visit modifications (e.g., GPS Distance Exception).



Security Report Library

Active Users Report: This report shows a list of all active users for the selected date range. The report displays when the user was created in the system, the date each user's password expires, the last time the user logged in, and assigned supervisors.

Use this report to review the roster of active users and their last log in times. System administrators can also use this report to review security changes.


Report Parameters
Account: Agency
For: 3/19/2024 - 3/19/2024 11:59:59 PM

Active Users

Account 20837: Agency Three A SIT-UAT Fuse

Username	Name	Created On	Expired Psw Date	Last Login	Assigned Supervisors
[illegible]	[illegible]	03/17/2024	05/16/2024		
[illegible]	[illegible]	03/18/2024	05/17/2024	03/18/2024 11:24 AM	
[illegible]	[illegible]	03/08/2024	04/29/2024	03/19/2024 01:31 PM	
[illegible]	[illegible]	03/18/2024	05/17/2024		
Total # of Users: 3					

Sandata 03/19/2024 14:54:15 Page 1 of 1

Report Requests Detail: This report shows all report requests made on a specific date. The report provides the username of the requester, the report ran, times, and report length.

Use this report to view what reports have been run in the system.

Report Parameters
Account: Agency
For: 3/19/2024 - 3/19/2024 11:59:59 PM

Report Requests Detail

REPORT TYPE:	Security	REPORT RUN START:	3/19/2024 4:39:51 PM	REPORT START RANGE:	3/19/2024 12:00:00 AM
REPORT NAME:	Report Requests Detail	REPORT RUN END:	3/19/2024 4:39:56 PM	REPORT END RANGE:	3/19/2024 11:59:59 PM
ROWS RETURNED:	29	USER NAME:		USER:	

							RECIPIENT					DCW/EMPLOYEE				
ACCOUNT	GROUP	JURISDICTION	PAYER	PROGRAM	SERVICE	SUPERVISOR	NAME	ID	MEDICAID ID	AR NUMBER	DEPARTMENT	NAME	SANTRAX ID	TEAM	TASK	VISIT STATUS
20837			All	All	All											All

REPORT TYPE:	Security	REPORT RUN START:	3/19/2024 2:59:36 PM	REPORT START RANGE:	2/20/2024 12:00:00 AM
REPORT NAME:	Client Relationships To Employees	REPORT RUN END:	3/19/2024 2:59:40 PM	REPORT END RANGE:	3/19/2024 11:59:59 PM
ROWS RETURNED:	0	USER NAME:		USER:	

							RECIPIENT					DCW/EMPLOYEE				
ACCOUNT	GROUP	JURISDICTION	PAYER	PROGRAM	SERVICE	SUPERVISOR	NAME	ID	MEDICAID ID	AR NUMBER	DEPARTMENT	NAME	SANTRAX ID	TEAM	TASK	VISIT STATUS
20837			All	All	All											All

REPORT TYPE:	Security	REPORT RUN START:	3/19/2024 2:54:12 PM	REPORT START RANGE:	3/19/2024 12:00:00 AM
REPORT NAME:	Active Users	REPORT RUN END:	3/19/2024 2:54:15 PM	REPORT END RANGE:	3/19/2024 11:59:59 PM
ROWS RETURNED:	1	USER NAME:		USER:	

							RECIPIENT					DCW/EMPLOYEE				
ACCOUNT	GROUP	JURISDICTION	PAYER	PROGRAM	SERVICE	SUPERVISOR	NAME	ID	MEDICAID ID	AR NUMBER	DEPARTMENT	NAME	SANTRAX ID	TEAM	TASK	VISIT STATUS
20837			All	All	All											All

Role Listing: This report displays a list of the account's roles and all the privileges assigned to those roles. This report includes the creation and deletion dates for each role.

Use this report to audit the roles for the account to ensure the appropriate privileges are assigned to the correct roles.

Report Parameters
Account: Agency [illegible]
For: 3/19/2024 - 3/19/2024 11:59:59 PM

Role Listing

Account [illegible]

ROLE	ROLE DESCRIPTION	CREATED	DELETED	PRIVILEGE DESCRIPTION
ASST_COOR	Supports the coordinator	2/28/2024 3:13 PM		Client Maintenance - View SSN
ASST_COOR	Supports the coordinator	2/28/2024 3:13 PM		Dashboard - Access Module
ASST_COOR	Supports the coordinator	2/28/2024 3:13 PM		Reports - Run Reports
ASST_COOR	Supports the coordinator	2/28/2024 3:13 PM		Reports: Access Module
ASST_COOR	Supports the coordinator	2/28/2024 3:13 PM		Run report: Visit Listing
ASST_COOR	Supports the coordinator	2/28/2024 3:13 PM		Visit - View Client/Employee SSN
ASST_COOR	Supports the coordinator	2/28/2024 3:13 PM		Visit - View GPS Map
ASST_COOR	Supports the coordinator	2/28/2024 3:13 PM		Visit - View Reason Codes
ASST_COOR	Supports the coordinator	2/28/2024 3:13 PM		Visit - View Tasks
ASST_COOR	Supports the coordinator	2/28/2024 3:13 PM		Visit Maintenance - View Module
COORDINATOR	Administrative generalist supporting various Santrax activities	2/28/2024 3:13 PM		Acknowledge exception: Client Signature Exception
COORDINATOR	Administrative generalist supporting various Santrax activities	2/28/2024 3:13 PM		Acknowledge exception: GPS Distance Exception

Role Membership: This report displays a list of all roles configured for the account and which users are assigned to those roles as of the date the report was run.

Use this report to audit role assignments for individual users. The report allows users to easily view the current role assignments and decide if changes are needed.

Report Parameters
Account: [illegible]
For: 3/19/2024 - 3/19/2024 11:59:59 PM

Role Membership

Account [illegible]

ROLE	ROLE DESCRIPTION	CREATED	DELETED	USER FULL NAME	USER NAME
ASST_COOR	Supports the coordinator	2/28/2024 3:13 PM		[illegible]	[illegible]
COORDINATOR	Administrative generalist supporting various Santrax activities	2/28/2024 3:13 PM		[illegible]	[illegible]
COORDINATOR	Administrative generalist supporting various Santrax activities	2/28/2024 3:13 PM		[illegible]	[illegible]
COORDINATOR	Administrative generalist supporting various Santrax activities	2/28/2024 3:13 PM		[illegible]	[illegible]
PROVIDER SECURITY ADMIN		2/28/2024 3:13 PM		[illegible]	[illegible]
PROVIDER SECURITY ADMIN		2/28/2024 3:13 PM		[illegible]	[illegible]
PROVIDER SECURITY ADMIN		2/28/2024 3:13 PM		[illegible]	[illegible]

System Activity: This report shows all the activity which took place in the system for a selected date range. The report displays a list of users, modules accessed, log in and log out times, and the actions made within the system.

Use this report to understand user activity within the system. Both the overall user login information is available as well as the time spent in each individual module. View individual user activity or activity for date range within the system.

Report Parameters
Account: [illegible]
For: 3/1/2024 - 3/1/2024 11:59:59 PM

System Activity

ACCOUNT			LOG DATE		USER		REQUEST				
PROVIDER ID	NO	NAME	IN	OUT	ID	NAME	START	END	MODULE	PRIVILEGE	DESCRIPTION
[illegible]	[illegible]	[illegible]	3/1/2024 1:59 PM		[illegible]		3/1/2024 5:00 AM	3/2/2024 4:59 AM	REPORTS	Run report: Alert Configuration	
[illegible]	[illegible]	[illegible]	3/1/2024 1:43 AM	3/1/2024 2:12 AM	[illegible]		3/1/2024 2:12 AM	3/1/2024 2:12 AM	SECURITY	User - Logout	
[illegible]	[illegible]	[illegible]	3/1/2024 1:43 AM	3/1/2024 2:12 AM	[illegible]		3/1/2024 1:45 AM	3/1/2024 1:45 AM	DATA ENTRY	Client Maintenance - Access Module	
[illegible]	[illegible]	[illegible]	3/1/2024 1:43 AM	3/1/2024 2:12 AM	[illegible]		3/1/2024 1:44 AM	3/1/2024 1:44 AM	DATA ENTRY	Client Maintenance - Access Module	

* date/time values in UTC time zone

Sandata 03/20/2024 09:57:11 Page 1 of 1

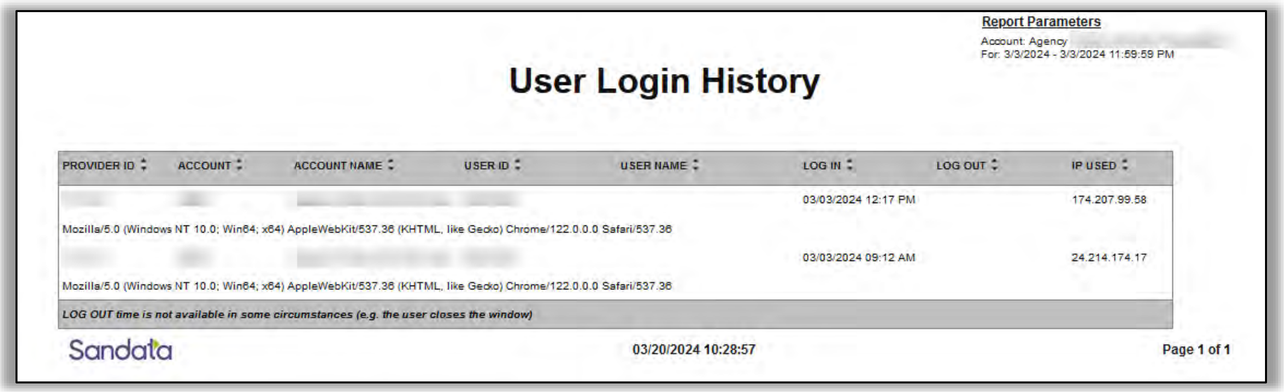
System Activity Export: This export shows all activity which took place in the system for a selected date range. The export includes a list of users, modules accessed, log in and log out times, and the actions made within the system.

Use this export to understand user activity within the system. Both the overall user login information is available as well as the time spent in each individual module. This can be used to view individual user activity or activity for a date range within the system.

ACCOUNT	ACCOUNT_NAME	PROVIDER_ID	LOGIN_TIME	LOGOUT_TIME	USER_NAME	USER_FIRST_NAME	USER_LAST_NAME	ACCESS_REQUEST_BEGIN_TIME	ACCESS_REQUEST_END_TIME	MODULE_NAME	PRIVILEGE_DESCRIPTION	ACCESS_DESCRIPTION
[illegible]	[illegible]	[illegible]	3/1/2024 1:59:03 PM		[illegible]	[illegible]	[illegible]	3/1/2024 5:00:00 AM	3/2/2024 4:59:59 AM	REPORTS	Run report: Alert Configuration	RolesMembership
[illegible]	[illegible]	[illegible]	3/1/2024 1:43:45 AM	3/1/2024 2:12:46 AM	[illegible]	[illegible]	[illegible]	3/1/2024 2:12:46 AM	3/1/2024 2:12:46 AM	SECURITY	User - Logout	UserLogout
[illegible]	[illegible]	[illegible]	3/1/2024 1:43:45 AM	3/1/2024 2:12:46 AM	[illegible]	[illegible]	[illegible]	3/1/2024 1:45:37 AM	3/1/2024 1:45:37 AM	DATA ENTRY	Client Maintenance - Access Module	Search Clients
[illegible]	[illegible]	[illegible]	3/1/2024 1:43:45 AM	3/1/2024 2:12:46 AM	[illegible]	[illegible]	[illegible]	3/1/2024 1:44:00 AM	3/1/2024 1:44:00 AM	DATA ENTRY	Client Maintenance - Access Module	Search Clients

User Login History: This report shows a list of all users who logged into the system for a selected date range. The report displays the username, time, browser, and the IP addresses of the users.

Use this report to allow authorized users to view all user login activity. This report can assist with audits and be used to identify trends or patterns.



Report Parameters
Account: Agency
For: 3/3/2024 - 3/3/2024 11:59:59 PM

User Login History

PROVIDER ID	ACCOUNT	ACCOUNT NAME	USER ID	USER NAME	LOG IN	LOG OUT	IP USED
					03/03/2024 12:17 PM		174.207.99.58
Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/122.0.0.0 Safari/537.36							
					03/03/2024 09:12 AM		24.214.174.17
Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/122.0.0.0 Safari/537.36							

LOG OUT time is not available in some circumstances (e.g. the user closes the window)

Sandata 03/20/2024 10:28:57 Page 1 of 1

12. Claims Matching

Module Objectives

- Identify the visit details that are referenced for claims matching.
- Understand the key differences between a verified and a processed visit.
- Troubleshoot visits that remain in a verified status.

What is Claims Matching?

When a claim is processed, the EVV aggregator is checked for supporting visits with 5 matching data elements:

- Billing Provider
- Recipient
- Dates of Service
- Payer, Program, and Service Provided
- Units

When a successful match is found, the EVV visit will switch to a Processed Status, and the Claims tab of the visit details screen will display summary claim information.

If a claim is submitted, but the EVV visit is missing one of the data elements, that EVV visit will remain in a Verified Status, and the Claims tab of the visit details screen will not display any information.

Addressing Claims Matching Errors

It is important to make sure any visit changes match what happened at the point of care. This means that sometimes the correction needs to be made to the claim, and other times the correction needs to be made to the EVV visit.

Description	EVV	Claim
There is no visit in EVV for the service date on the claim	Use the Create Visit Button in Visit Maintenance to create the visit	Fix the date of service on the claim.
The visit in EVV is not in a verified status before billing.	Correct exceptions in EVV, using Visit Maintenance.	Correct exceptions in EVV, using Visit Maintenance.
The Medicaid ID entered in the EVV system for the Recipient does not match the claim.	Update the Recipient record.	Update the Recipient Medicaid ID number on the claim.
The service code billed on the claim does not match the service on the visit.	Fix the service code on the visit. This may also require you to update the Recipient record.	Fix the procedure code on the claim.
The billed units are less than what the visit shows in EVV.	Adjust the time of the visit to match what happened at the point of care.	Reduce the units on the claim.

13. Group Visits

Module Objectives

- 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.
- Edit/enter a group visit code for a visit.

The Group Visit option in the Sandata Mobile Connect (SMC) application and Telephonic Visit Verification (TVV) is used when 1 or more DCW/Employees are providing like services to more than 1 individual at the same time or overlapping times.

Starting a Group Visit

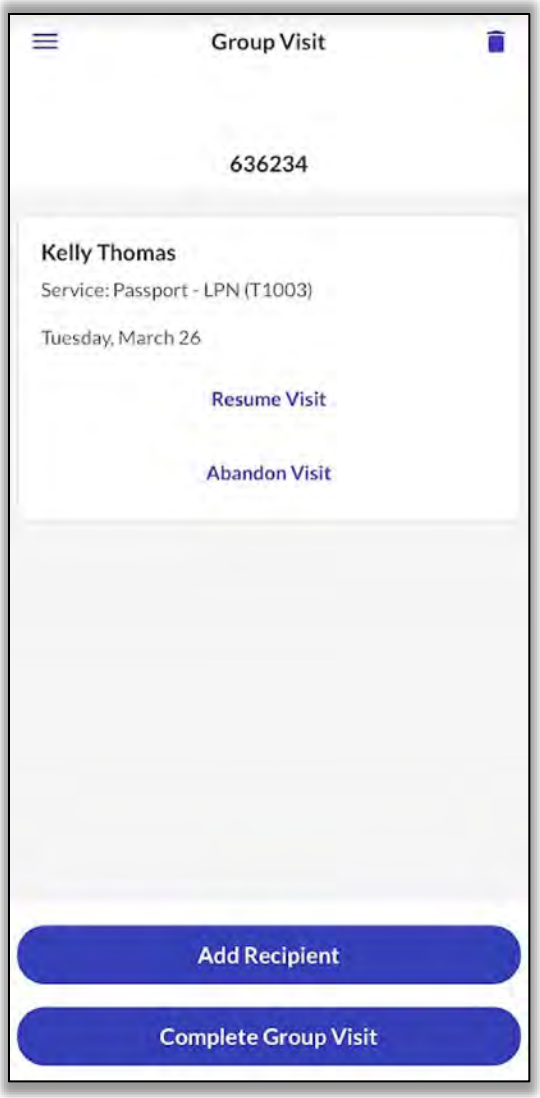
1. Log in to SMC, then search for the Recipient using the Recipient ID or Medicaid ID.

2. Select **Start Group Visit**.

3. Select the **Service** and the **Location.**

4. Tap **Start Group Visit** and select **YES** when prompted.

5. The Group Visit will display in progress.



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

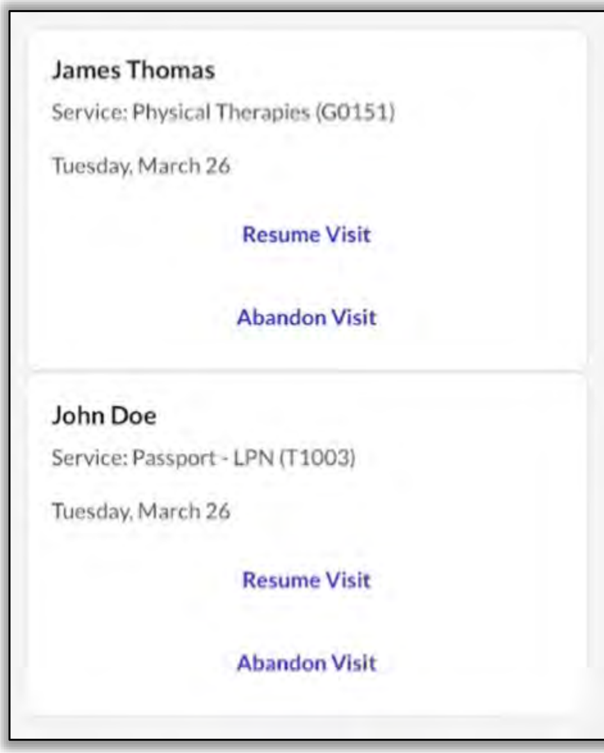
The DCW or Employee may add additional Recipients they are providing care for the group visit. The DCW or Employee may also give the Group Visit code to other DCWs or Employees arriving to provide care to the same Recipients or different Recipients at the location.

Adding a Recipient

1. Tap **Add Recipient** to search for additional Recipients to add to the group.

2. The Search Recipient screen will load. Search for the Recipient, select **Start Group Visit,** and complete all required steps.

3. Once added, the Recipients will appear together on the Group Visit screen.



A DCW or Employee will only see the Recipients he or she added to the group visit, even if other DCWs or Employees join the group and add Recipients.

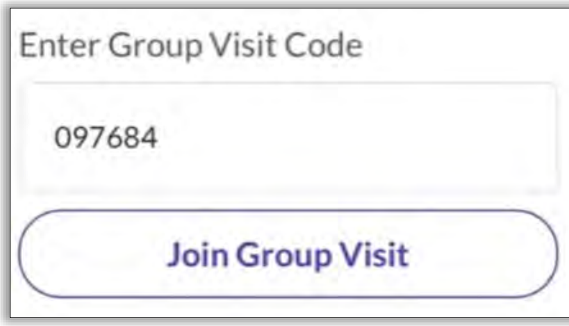
There is no limit to the number of known Recipients a DCW or Employee can add to a group visit, or the number of DCWs or Employees who can join a group visit. However, a DCW or Employee can only add one unknown Recipient to a group visit.

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

Joining a Group Visit

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

1. Log in to SMC, then search for the Recipient using the Recipient ID or Medicaid ID.
2. Enter the 6-digit group visit code and tap **Join Group Visit**.

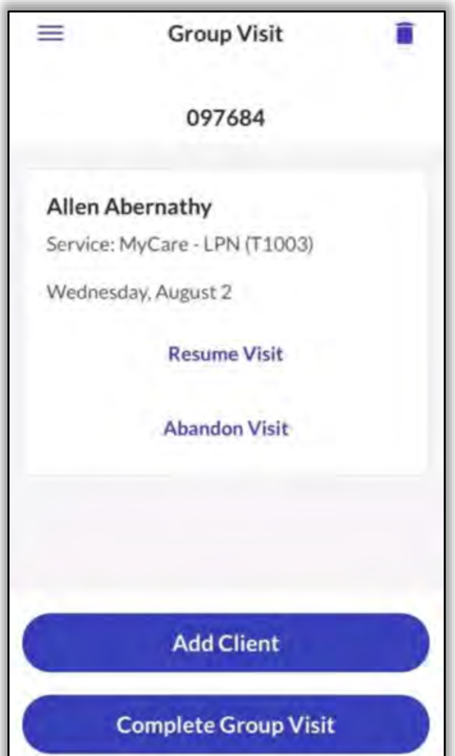


3. Select the Service and the Location.

NOTE: Each DCW or Employee and recipient combination will have individual start and end times as well as a service that is appropriate for that recipient.

4. Tap **Start Group Visit** and then select **YES** when prompted.

5. The Recipient is added to the existing in-progress Group Visit. The DCW or Employee may add additional Recipients or log out of SMC.



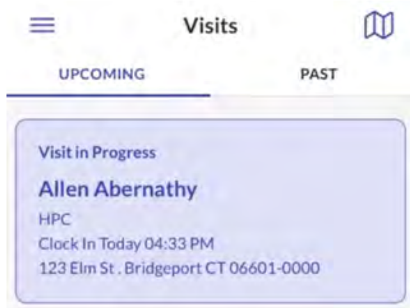
NOTE: If the Medicaid ID or Recipient ID entered when searching for a Recipient does not return any results, the DCW or Employee can add an unknown Recipient to the group visit. A DCW or Employee can only add a maximum of 1 unknown Recipient to a group visit.

Completing a Group Visit

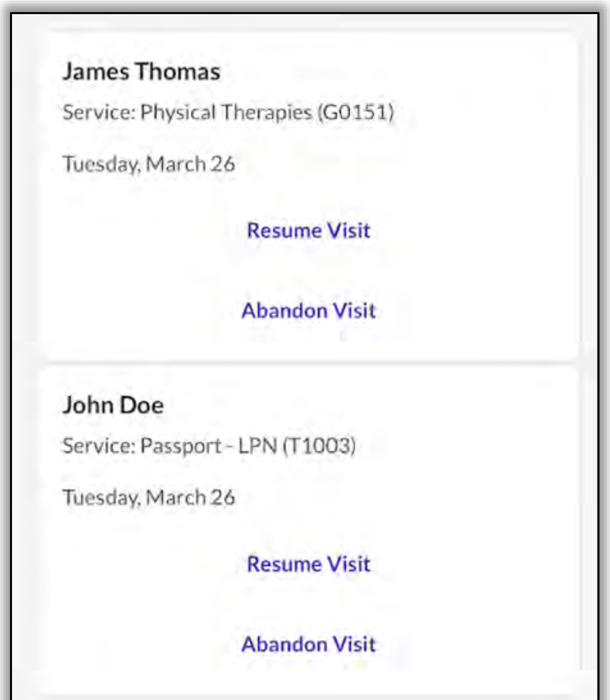
A DCW or Employee can complete his or her visits within a group individually or complete all visits within a group together. If 1 or more Recipients have a different call-out process, the DCW/Employee must complete the visits individually.

Completing a visit within a Group Visit Individually

1. Log back into SMC.
2. Tap the visit, located under the Upcoming section of the Visits tab.



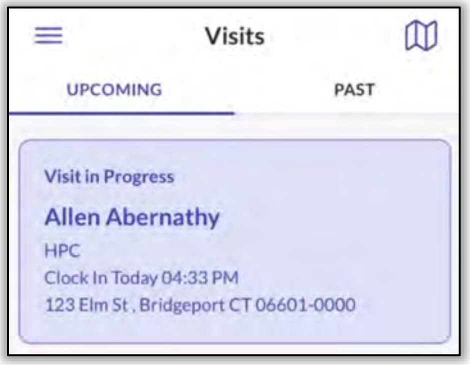
3. Tap **Resume Visit** next to the Recipient whose visit you would like to complete.



4. Complete the visit following the individual visit process.

Completing all visits within a Group Visit Together

1. Log back in to SMC.
2. Tap the visit, located under the Upcoming section of the Visits tab.



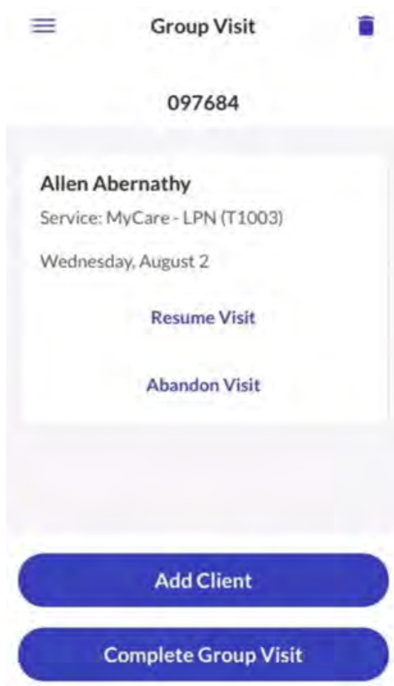
3. Tap **Complete Group Visit**.

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

   NOTE: When completing a group visit, the DCW or Employee completes his or her Recipient's visits.

Abandoning a Group Visit

1. Log back into SMC.
2. Tap **Abandon Visit**.



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

   NOTE: When abandoning a group visit, all the DCW or Employee's visits within the group appear in Sandata EVV as an incomplete visit and must be verified in Visit Maintenance.

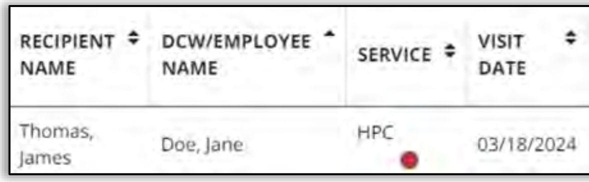
Group Visit Telephonic Visit Verification (TVV) Call Process

Please refer to the Group Visit call reference guide for assistance recording a group visit using TVV.

Editing a Group Visit Code

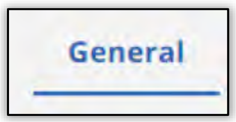
If a visit is linked to an incorrect group visit or was supposed to be part of an existing group visit, a user can edit the existing code.

1. Select the visit.



RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE
Thomas, James	Doe, Jane	HPC	03/18/2024

2. Select the General tab.

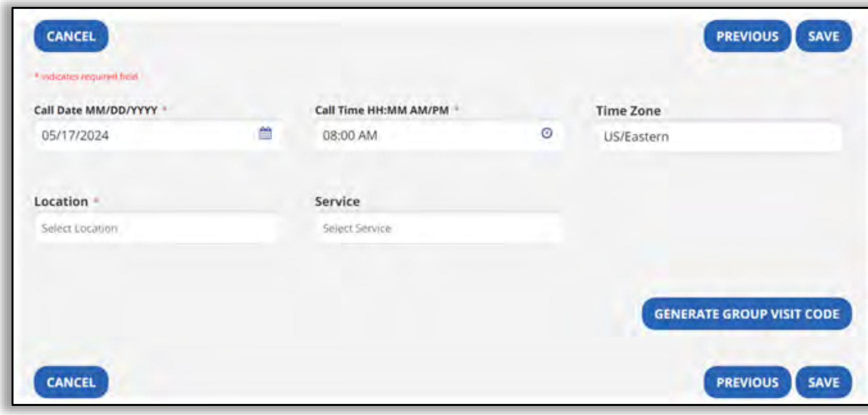


3. In the Group Visit Code field, enter the group visit code or edit the existing code.

4. Select the **Reason Code**, then select **SAVE.**

Creating a Manual Group Visit

The Create Call feature allows the user to create a call in Sandata EVV for instances when a visit occurred, but the DCW or Employee did not call-in or call-out. If creating a group visit, select the **GENERATE GROUP VISIT CODE** button to obtain a group visit number on the last step of the Create Call or Create Visit screens.



14. 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 (BYOD)	The term used for the option of a DCW or Employee choosing to use their personal mobile device to call-in and call-out for visits

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
Direct Care Worker	A person who is employed by an agency provider to provide care to one or more Recipients

E

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

Interactive Voice Response (IVR)	The physical system that answers Telephonic Visit Verification calls

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
Recipient	An individual who receives services through the Medicaid program, known in Ohio as a Medicaid Member

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 (SMC)	Sandata's Mobile Visit Verification application

T

Telephonic	The system used to record calls for visits
Telephonic Visit Verification (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 Recipient in a home and community-based setting.
Visit Maintenance	The module within Sandata EVV where visits can be corrected and/or acknowledged