Ready, Set, Go
EVV Implementation Checklist

On September 30, 2024, the Massachusetts Executive Office of Health and Human Services (MA-EOHHS) will open access to a new Electronic Visit Verification (EVV) system. Sandata has been selected as the state-sponsored EVV system, and your success is our priority. This checklist is tailored to keep you on track and ready for the launch of the new system as well as the first few weeks after.

Navigate to the MA EVV webpage to view the full list of services that require EVV, by service code.

Provider Agency Administrators & Staff Using Sandata EVV

Pre-Launch – Through September 29, 2024
Provider Administrators and Staff

☐ Attend Sandata town halls or view recordings to learn about the EVV system.
- Town Hall #1 Recording
- Town Hall #2 Recording
- Town Hall #3 Registration Link – September 24, 2024, at 2:00 p.m. ET
- Town Hall #4 Registration Link – December 3, 2024, at 2:00 p.m. ET

☐ If you don't already have it, get your Provider ID and Service Location (PIDSL) number at one of these two locations:
- MassHealth Provider Portal, located under "my account"
- Provider Online Service Center virtual gateway, found under Billing Service and the Billing Provider ID drop down menu

☐ Assign a primary user for Sandata EVV. This person will serve as the provider agency administrator and handle adding other staff to the EVV account.

☐ Have the provider agency administrator submit the [Agency-based Electronic Visit Verification (EVV) System and Data Aggregator User Request Form (URF)](#) to obtain Single Sign-On (SSO) credentials.

NOTE: Each individual within a provider agency who will be using Sandata EVV (Sandata's administration and visit management portal), must have their own MyMassGov account. The provider agency administrator can submit all administrator and coordinator staff who will need access on the same User Request Form, using the second page of the form. **This is not required for employees using Sandata's mobile device application (Sandata Mobile Connect).**

NOTE: Do not complete the Org Name or Org ID fields on the URF.

☐ Complete Sandata EVV registration through the [Provider Self-Registration Portal](#) using the same email address you used for your MyMassGov account. Failure to use the same email address will prevent you from logging into the Sandata system.

NOTE: The Provider Self-Registration Portal will ask for your Medicaid ID. Use your Provider ID and Service Location (PIDSL) number in that field.

☐ Ensure Sandata.com emails are not going to your junk folder. Speak to your IT administrator if you need help.

☐ Read all Sandata emails for important information.

☐ Complete EVV Agency Administrator Training via [Sandata Learn](#).

☐ Review Sandata EVV learning paths and have staff sign up for self-paced training courses in [Sandata Learn](#), available for them to take at their convenience. Additionally, three weeks of instructor-led training will be available starting in October.

☐ Develop a plan for employees who have visits scheduled for the launch date. Communicate how to record visit data until the employee has access to Sandata Mobile Connect (SMC).

☐ Develop training for your employees on the visit capture tools.
Employee Training Toolkit

Employees

☐ Attend employer-led training for Employees on visit capture using the Sandata Mobile Connect (SMC) App.

☐ Access the Caregiver Library section of Sandata On-Demand to review training documents for the Sandata Mobile Connect app.

NOTE: Caregiver is a standard Sandata term across our systems. In Massachusetts a caregiver is known as an "Employee."

☐ Complete an update of your Android or Apple mobile device to the newest operating system.

☐ Download the Sandata Mobile Connect App from the Apple Store or Google Play Store.

Day before Launch Date – September 29, 2024

Provider Administrators and Staff

☐ Ensure your employees know how to record visit data if they have visits scheduled before employees are added to the Sandata EVV system on Launch Day.

System Launch Day – September 30, 2024

Provider Administrator

☐ Open the Welcome Kit you will receive by email and review the included information.

☐ Access your Welcome Letter with Sandata EVV system credentials through [eTRAC](#).

☐ Add office staff to the Sandata EVV system.

NOTE: Office staff will not be able to access the system until they receive Single Sign-On credentials through the User Request Form.

☐ In the EVV system, grant Sandata Mobile Connect app access to all current employees who need it. This will trigger an email to be sent to their email with a temporary password for them to sign into the app.

NOTE: Please let employees know that they will receive this email and should open it from their mobile device after they have downloaded the SMC app.

NOTE: You should see your current authorizations and their associated clients in the system.

Employees

☐ Download the Sandata Mobile Connect (SMC) app through the [Apple Store](#) or [Google Play](#). You will be able to log in once your employer has given you access.

☐ Complete your first-time log-in to SMC.
   [How to Log in to SMC the First Time](#)

☐ If you do not have access to the SMC app, complete your scheduled visits using an alternate visit verification method offered by your provider.

First Week After Launch

Provider Agency Administrator & Staff

☐ Begin review of visit data entered through Sandata EVV.

Employees

☐ Enter visit information through the Sandata Mobile Connect app. If you cannot use the app, use an alternative method approved by your employer.

    [How to Start and Complete a Visit in Sandata Mobile Connect](#)

Key System Terminology Comparisons

Sandata Term	Massachusetts
Caregiver	Employee
Medicaid ID	Provider ID and Service Location (PIDSL)

Provider Agency Administrators Using an Alternate EVV System

Pre-Launch – Through September 29, 2024

Provider Agency Administrators and Staff

☐ Attend Sandata town halls or view recordings to learn about the EVV system.

- [Town Hall #1 Recording](#)
- [Town Hall #2 Recording](#)
- Town Hall #3 Registration Link – September 24, 2024, at 2:00 p.m. ET
- Town Hall #4 Registration Link – December 3, 2024, at 2:00 p.m. ET

☐ If you don't already have it, get your Provider ID and Service Location (PIDSL) number.

- [MassHealth Provider Portal](#), located under "my account"
- [Provider Online Service Center virtual gateway](#), found under Billing Service and the Billing Provider ID drop down menu

☐ Assign a primary user for the [Sandata Aggregator](#). This person will serve as the provider agency administrator and handle adding other staff to the Aggregator account.

☐ Have the provider agency administrator submit the [Agency-based Electronic Visit Verification (EVV) System and Data Aggregator User Request Form (URF)](#) to obtain Single Sign-On (SSO) credentials.

NOTE: Each individual within a provider agency who will be using the Sandata Aggregator, must have their own MyMassGov account. The provider agency administrator can submit all administrator and coordinator staff who will need access on the same User Request Form, using the second page of the form. **This is not required for employees using Sandata's mobile device application (Sandata Mobile Connect).**

NOTE: Do not complete the Org Name or Org ID fields on the URF.

☐ Complete Alternate EVV registration through the [Provider Self-Registration Portal](#) using the same email address you used for your MyMassGov account. Failure to use the same email address will prevent you from logging into the Sandata system.

NOTE: The Provider Self-Registration Portal will ask for your Medicaid ID. Use your Provider ID and Service Location (PIDSL) number in that field.

☐ Ensure Sandata.com emails are not going to your junk folder. Speak to your IT administrator if you need help.

☐ Read all Sandata emails for important information.

☐ Complete Sandata Aggregator training for administrators via [Sandata Learn](#).

☐ Ensure your selected vendor registers through the [Vendor Self-Registration Portal](#) so they can complete testing and get production credentials.
   [Alternate EVV Testing Specifications](#)

NOTE: After your Alternate EVV vendor successfully completes testing and receives their production credentials, you will be notified.

Contacts and Resources

For general questions about the MA-EOHHS program, please email
EVVfeedback@Mass.gov. You can also visit the MA-EOHHS EVV website for
more information.

For technical help in using the EVV system, please contact Customer Support
through Submit a Request at Sandata On-Demand. You may also call the
Customer Support line at 833.511.0164. Please be aware of higher call
volume during the go-live period.