



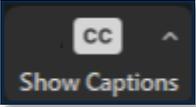
Sandata EVV Town Hall #4 Massachusetts EOHHS

Tuesday, December 3, 2024





Meeting Etiquette

- ▶ This session is being recorded and will be available on Sandata On-Demand, our learning portal
 - Portions of this recording may serve as an EVV training resource
 - We will include a link to the [EOHHS EVV webpage](#) with this content
- ▶ Enable captions by selecting 'Show Captions' on your toolbar 
- ▶ For questions, please use the 'Q&A' feature at the bottom of your screen
 - Questions will be addressed during today's session.
 - Questions will also be documented in Q&A documents on the [EOHHS EVV webpage](#) and [Sandata On-Demand](#)
 - You can also email questions directly to EOHHS at EVVfeedback@Mass.gov



Agenda

- EOHHS Program Updates
- EVV Onboarding Steps
- Alternate EVV Specification Updates
- Provider & Alt EVV Training
- Next Steps





EOHHS Program Update





EVV Implementation Overview

Electronic Visit Verification (EVV) is a federal requirement for Medicaid-funded **personal care and home health services that require an in-home visit**. The Executive Office of Health and Human Services (EOHHS) administers the Massachusetts Medicaid program known as MassHealth. EOHHS oversees the implementation and operation of EVV in programs that provide certain home and community-based services.

EOHHS has identified certain services as required for EVV—these include services that are or are related to personal care services and home health services. Providers of these services will be required to use EVV. **Please see the [Massachusetts EVV website](#) for the approved list of all service codes.**

The Massachusetts Electronic Visit Verification (EVV) program is **live as of September 30, 2024**. Providers required to use EVV must register their intent to use either the state-sponsored EVV solution, or an alternate EVV (Alt EVV) vendor system, **no later than December 9, 2024**.



EVV Implementation Key Activities

Key Activities	Scheduled Date*	Status
EVV Overview Forum Session #1	Thursday, May 30, 2024	Completed
EVV Overview Forum Session #2	Thursday, June 6, 2024	Completed
Town Hall #1 – Sandata Intro & EVV Overview	Tuesday, June 25, 2024	Completed
Town Hall #2 – Provider Registration, Alt EVV Specs & Vendor Registration & Testing	Tuesday, August 20, 2024	Completed
Vendor Portal Opens for Registration & Alt EVV Vendor Testing	Wednesday, August 21, 2024	Completed
Town Hall #3 – Program Review, Provider & Vendor Portals, Launch updates & Provider Onboarding	Tuesday, September 24, 2024	Completed
EVV Program Go Live	Monday, September 30, 2024	Completed
Town Hall #4 – Program Updates, Onboarding Review, Training & Support	Tuesday, December 3, 2024	Today – In Progress
EVV Program Required Registration	Monday, December 9, 2024	Upcoming
Providers Operationalize EVV Within Their Agency	End of January 2025	Upcoming

*Note these scheduled dates are subject to change.





Provider EVV Implementation Key Tasks

12/9/2024

12/13/2024

12/13/2024

1/10/2025

1/15/2025

1/31/2025

01

Register & Indicate Choice of EVV System

- Register with Sandata indicating use of the state-sponsored EVV system, Sandata, or an Alternate (Alt) EVV system.
- For additional step-by-step registration guidance, reference the [Ready, Set, Go Checklist](#).

02

Submit URF

- 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.
- For assistance with SSO credentials and the URF, please reach out to the Virtual Gateway Customer Service Phone (800) 421-0938 or reference the [Virtual Gateway Business Login User Reference Guide](#).

03

Complete Training

- Complete training applicable to your user type (including Alt EVV).
- [Log in to Sandata Learn](#), the Sandata Learning Management System, and complete applicable training. You can choose to register for [live instructor-led sessions](#) or enroll in self-paced online courses that will continue to be available 24/7.

04

Rollout Training to Employees

- Rollout training for your employees/workers.
- Reference the Sandata [Employee Training Toolkit](#) and the [Caregiver Library](#) section of Sandata On-Demand to review training documents for the [Sandata Mobile Connect app](#).

05

Setup Employees

- Setup Sandata Employees (grant Sandata Mobile Connect app access to all current employees who need it), Clients, Schedules (optional), etc. or Customize Alt EVV per Sandata Specifications.
- 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.

06

Employees Begin Using Sandata or Alt EVV

- Employees should be using Sandata to log EVV Visits or send EVV Visits as Alt EVV.
- Review [questions submitted during the Town Halls](#) and answers provided by Sandata staff. Additional [EVV program policy questions](#) are available on the MA EVV website.

Reference the above recommended milestone dates to prepare your provider agency and take advantage of the available training and support as part of your go-live process. However, we encourage you to start using your chosen system as soon as possible and utilize the dates as reference points to complete the outlined implementation tasks.



Initial & Future Compliance Thresholds

The Commonwealth of Massachusetts has not yet published compliance thresholds for EVV Implementation. The current focus continues to be **registration and onboarding** in the initial stage of compliance.

Initial Stage of Compliance

Compliance	Measurement	Timing	Action
Initial Compliance – Have you registered for EVV?	Registration for EVV	December 2024/January 2025	Program Follow-Up

Future Stages of Compliance

Compliance	Measurement	Timing	Action
2nd Phase of Compliance – Are you using EVV?	Thresholds and Measures To Be Determined	To Be Published	Escalated series of warnings regarding adoption
Final Phase of Compliance	Pre-Claims Matching Visit Check	To Be Published	Initially will implement soft-edits; hard edits when appropriate/ready



Current MA EVV Implementation By The Numbers

MA EVV Implementation metrics as of today, 12/3/2024.

314

Provider Registrations

784

User Request Forms Processed

143

Completed Admin Security Training

2,112

Employees Created

40

Vendor Registrations

10,077

Visits Captured





MA EOHHS Policy Common Questions

Q: When will providers be required to start using Sandata EVV (or start sending visit data to the EVV data aggregator as Alt-EVV providers)?

- ▶ A: Providers can begin using their chosen system as early as September 30, 2024. Provider compliance requirements will be set forth in a provider agency EVV compliance plan that will be provided and enforced at a later date (after December 2024).

Q: Do I need an email address to register with Sandata?

- ▶ A: Yes, you need an email address to register. When you're completing the Sandata EVV registration through the [Provider Self-Registration Portal](#), use the same email address you used for your [MyMassGov](#) account. Otherwise, you won't be able to log in to Sandata.

Q: Do I have to record the tasks I perform while in a home providing care?

- ▶ A: Massachusetts does not require you to record tasks for EVV. Instead, record units by service code/HCPCS code. Services will be recorded in Sandata, but tasks won't. For example, Sandata will record home health aide/personal care aide/direct care aide services, but not specific activities of daily living (ADLs) or instrumental activities of daily living (IADLs) that are performed. Alt-EVV systems must send visit data to the EVV data aggregator, reported by service code.

Q: Do we still need to have timeslips/paper timesheets? Is EVV replacing My Timesheet?

- ▶ A: EVV replaces paper timesheets for the purpose of capturing the six required CMS data elements for EVV visits. Any other policy/program requirements for capturing clinical information and other information will still be in place.

Q: Will there be a delay in MA EVV Implementation due to Sandata acquisition?

- ▶ A: Sandata Technologies, LLC has been acquired by HHAExchange, a leader in homecare management solutions for providers, caregivers, managed care organizations, and state Medicaid programs. We do not expect any disruption to the successfully launched MA EOHHS EVV program services or technology. Sandata customers (inclusive of all customers and programs) will continue to use the same software, work with the same team, and receive the highest quality of support. The MA EOHHS EVV program was live on September 30, 2024, and continues to see provider and alternate provider agencies participate in the collection of visits.

Q: Will agencies be charged a fee for using Sandata?

- ▶ A: The Commonwealth covers the cost of Sandata, but not the cost of any devices or Internet connection.

EVV Onboarding Steps



Sandata Self Registration Portal Process



Sandata's Provider Self-Registration Portal

Where does a provider agency administrator go to access the EVV Provider Self-Registration portal?

- EVV Provider Self-Registration Portal - <https://evv-registration.sandata.com/provider-registration>

What is needed to successfully complete registration?

- Provider Agency Administrator must complete registration.
- The Provider Identification Number (PID/SL) is the unique 9-digit identifier required for registration.
- Only one registration is needed unless your 9-digit number changes.

Why is provider registration required?

- First onboarding step for your provider agency.
- EVV designation (Sandata EVV or Alt EVV vendor) determines the provider account in the Sandata Aggregator.
- Provider agency accounts are linked to the MassHealth Virtual Gateway for Single Sign-On (SSO).

Sandata
Get more right from the start

EVV Provider Self-Registration

Please select the EVV program in which you would like to register:

SELECT EVV PROGRAM *
Massachusetts EOHHS

Please enter your unique provider identifier for the EVV program:

ENTER PROVIDER MEDICAID ID *
Enter Provider Medicaid ID

Register

Provider Self-Registration Common Questions

Q: Can an agency select ALT EVV as their EVV solution and change to Sandata EVV?

- ▶ A: Yes, if the provider is changing solutions or Alt EVV vendors, please submit a Sandata support ticket for assistance.

Q: We are going to use two separate Alt EVV vendors. Are we able to register each vendors with one PID/SL #?

- ▶ A: Each PID/SL number can register only once in the Registration Portal. To register a second vendor, please submit a Sandata support ticket for assistance with adding the second Alt EVV vendor.

Q: Can you find out if a vendor has registered and has been certified?

- ▶ A: During provider registration, if "Alt EVV" is selected, a list of approved vendors with a relationship to Sandata will be provided. Each vendor must certify separately, one time, for the MassHealth program.

Q: If an alternate EVV vendor is registered, do other agencies using that vendor also need to register?

- ▶ A: Each agency must register in the EVV Provider Self-Registration Portal.

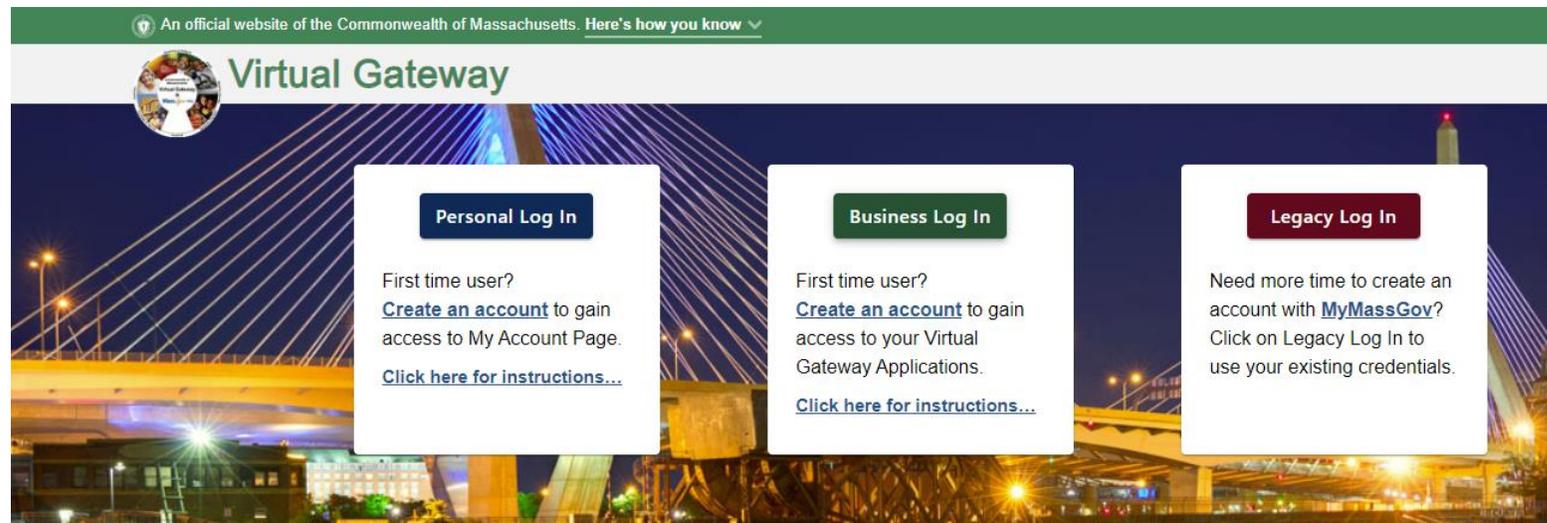
MassHealth Virtual Gateway Access



Mass Health Virtual Gateway Requirements

Provider agency administrators must complete these steps for staff to access Sandata EVV and the Aggregator through the MassHealth Virtual Gateway.

- Fill out and submit User Request Form (URF) to MassHealth - <https://www.mass.gov/info-details/user-request-forms>
- Allow 7-10 business days for access request to be processed
- Once URF is processed, an email will be sent for you to complete the Virtual Gateway steps



User Request Form (URF)

- ▶ Each user of Sandata EVV or the Aggregator must have their own Massachusetts Health ID.
- ▶ Email addresses on the URF must match those in Sandata EVV.
- ▶ Provider Agency Administrators must submit the URF for all staff needing access.
- ▶ URF must be submitted in Excel format and attached to email.
- ▶ Final setup steps will be emailed once the request is processed.
- ▶ Legacy logins must be switched to business logins.

An official website of the Commonwealth of Massachusetts [Here's how you know](#)

Menu Select Language Contrast Settings

Mass.gov Search Mass.gov

Home > Health & Social Services > Virtual Gateway > Organization Management

OFFERED BY Executive Office of Health and Human Services

User Request Forms

In order to gain access to the Virtual Gateway, an organization's Access Administrator must complete the appropriate User Request Form (URF) and Rider Form, if required by business service.

User Request Forms (URFs)

Each URF is specific to the Virtual Gateway service an organization will use so please select the appropriate URF below. Please download a copy to your desktop, complete the form as per the instructions on the form, and email the complete form to the email address indicated on the form.

- **Agency-based Electronic Visit Verification (EVV) System and Data Aggregator User Request Form (URF)**
- Appeals Processing System (APS) User Request Form
- BSAS eLicensing Provider User Request Form
- Children's Behavioral Health Initiative (CBHI) User Request Form
- Cognos User Request Form (State Employee)

<https://www.mass.gov/info-details/user-request-forms>

Virtual Gateway Access (URF) Common Questions

Q: Will our current gateway user/password work for Sandata?

- ▶ A: Yes, you'll need to submit a User Request Form (URF) to add the Sandata EVV application to your MassHealth page. Once approved, log in to the Virtual Gateway, access the Sandata EVV/Aggregator tile, and you'll be directed to the EVV portal.

Q: In what format should the URF be submitted?

- ▶ A: Submit the URF as an Excel attachment; MassHealth does not accept PDFs or encrypted/SharePoint files.

Q: Does the bottom of the URF need to be filled out?

- ▶ A: Yes, the URF must include the authorized administrator's contact information at the bottom..

Q: Who should submit the URF to MassHealth?

- ▶ A: The authorized provider agency administrator must email the URF.

Q: Is there a required form template?

- ▶ A: Yes, the User Request Form (URF) must be used without modifications.

Q: How long does MassHealth take to process the URF?

- ▶ A: MassHealth has a 7-10 business day SLA for processing requests.

Q: How will I know if the URF is processed?

- ▶ A: MassHealth will email each user with their Virtual Gateway New Account or Changes, including next steps.

Q: What should an agency do if the URF isn't processed in 10 business days?

- ▶ A: The Authorized Administrator should email virtualgatewayhelpdeskfaxes@massmail.state.ma.us for a status update, including the submission date and associated application.

Completing Required Training



Sandata Learn & Other Training Resources

Below are the training paths for Provider Agencies who will be entering visits using Sandata EVV.

Provider Agency Administrators

- MA-EOHHS Sandata EVV: Admin & System Security
- Other MA-specific and Sandata EVV self-paced courses available
- Sign up for instructor-led training under "Events"

Agency Office Staff

- Self-paced MA-specific and Sandata EVV courses available
- Sign up for instructor-led training under "Events"

Employees

- Trained by agency staff using "Caregiver Library" on Sandata On-Demand
- Can access SMC materials on Sandata On-Demand



Sandata Training & Learning Common Questions

Q: Should clinicians log in to Sandata Learn or Sandata On-Demand?

- ▶ A: Employees (known as Caregivers in the Sandata EVV system) can access the Caregiver Library at Sandata On-Demand without having to log in. There is no need for them to log in to Sandata Learn.

Q: What credentials are required for Sandata Learn? Do users need access to the MA Virtual Gateway? To Sandata as users?

- ▶ A: Sandata Learn is not tied to the MA Virtual Gateway or Single Sign-On. You can register at Sandata Learn independently. Provider Agency Administrators must use the same email used for registration in the Provider Self-Registration portal.

Q: We can't "follow" articles on Sandata On-Demand.

- ▶ A: Users must first sign up to access articles in Sandata On-Demand to use the follow feature. The log in is how the system will know where to send an alert when the article is updated.

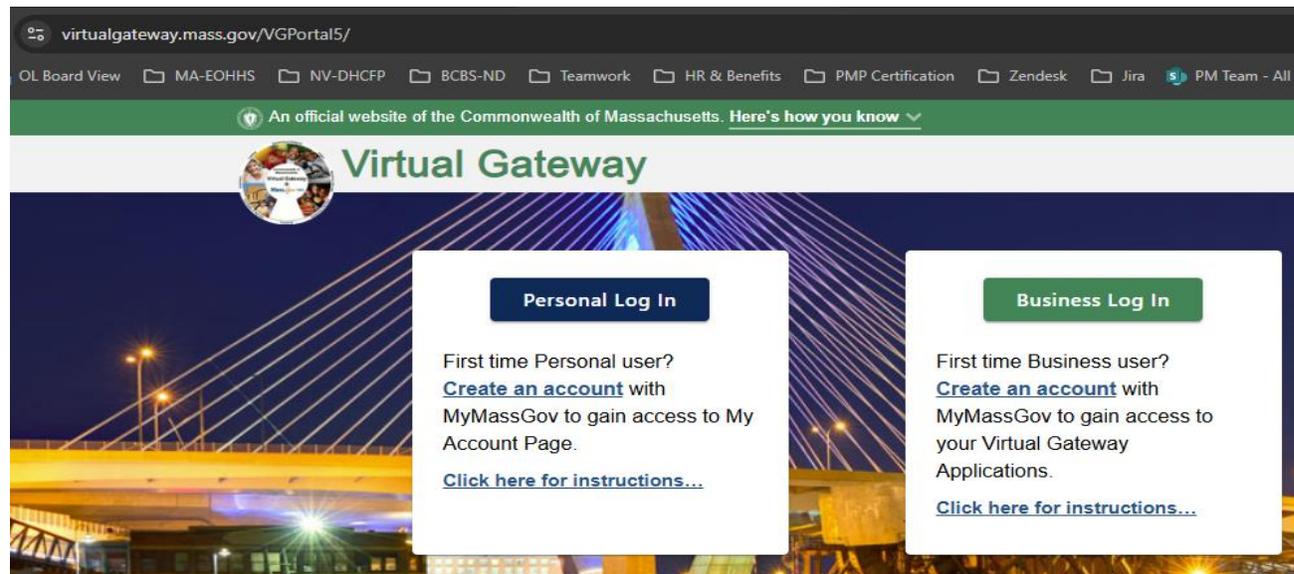
Logging Into Sandata EVV



Logging Into Sandata EVV Using SSO Process

SSO Log in Process to Sandata EVV and Aggregator

- Use Virtual Gateway Business Log In to access Sandata EVV and Aggregator - <https://virtualgateway.mass.gov/VGPortal5/>
- Legacy virtual gateway users will need to convert their login to a business user login
- Email addresses submitted on the URF must match those used in Sandata EVV
- Sandata EVV cannot be accessed until the Provider Agency admin has setup each user



Logging Into Sandata EVV Common Questions

Q: Will our current gateway user/password work to access Sandata or do we need an additional user/password for this app?

- ▶ A: You will need to submit a User Request Form (URF) to get the Sandata EVV application added to your MassHealth application page. You will then log in to the Virtual Gateway to access the Sandata EVV/Aggregator tile which will take you to the EVV portal site.



Adding Employees in Sandata EVV

The provider agency administrator is responsible for adding employees in Sandata EVV to grant access to the SMC application and Aggregator.

- For employees who will use the SMC app, the **SMC flag** must be checked to trigger a welcome email to those employees.
- Employees can be added either manually or through the **Employee Bulk Upload template**.

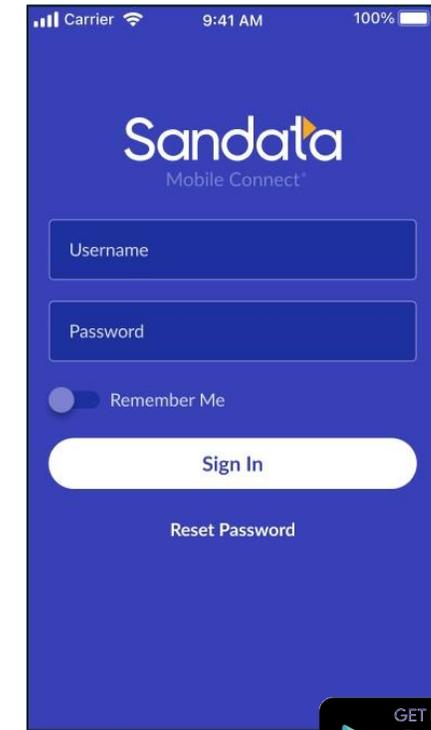
The screenshot displays the Sandata EVV interface. On the left is a navigation menu with 'Employees' highlighted. The main area shows a table of employees with columns for NAME, STATUS, and EMPLOYEE ID. A 'CREATE EMPLOYEE' button is visible at the top of the table. An inset window titled 'New Employee' is overlaid on the right, showing a form with fields for Last Name, First Name, Position, SSN Last 5 Digits, Phone, and National Provider ID. A 'CREATE EMPLOYEE' button is at the bottom right of the form. Red boxes and arrows highlight the 'CREATE EMPLOYEE' buttons and the 'Position' dropdown menu.

NAME	STATUS	EMPLOYEE ID
Adams, Summer	Active	00012760
Day, Sunny	Active	569325
Ditka, Michelle	Active	769851
Doe, Mary Jane	Active	508646
Jugs, Justin	Active	99999923
Lackey, Lucy	Active	900813
Lawson, Annie	Active	99999966
Ma, Julie	Active	000000
Nguyen, Thanh	Active	55522666
Odwin, Rita	Active	555560
SANTRAK, SANTRAK	Active	00SANTRAK
Tamfor, Setu	Active	651741
Testing1, App	Active	056775685
user, spm	Active	000000
Webster, Lisa	Active	844376

For Employee in the Field - Sandata Mobile Connect®

Sandata Mobile Connect (SMC) meets your employees and members where they are to ensure an easy-to-follow experience.

- ▶ Primary method of EVV for state programs
- ▶ Available for iOS / Android
- ▶ Works connected or disconnected (“Offline”)
- ▶ Captures GPS at the start and end of the visit ONLY
- ▶ Encloses multiple languages (for the employee and member) to support diverse needs



Adding Employees Common Questions

Q: If we use a scheduling/payroll program that does not have EVV capabilities and we use Sandata for EVV, how can our users and consumers be added to Sandata... one by one or via group uploads?

- ▶ A: Sandata provides bulk upload capabilities for provider employee data for initial setup

Q: After adding employees using bulk upload, will you have to manually enter any thereafter? And is the bulk upload for BOTH patients and employees?

- ▶ A: The bulk upload is a one-time upload for initial upload of employees only. Members will be coming in via the member feed from The State. If there is an Authorization, the member will automatically be fed into your account. If there isn't an Authorization, the Agency will need to enter

Alt EVV Vendor Registration Process



Vendor EVV Self-Registration Portal

Where does an Alt EVV vendor access the Sandata Self Registration portal?

- Self-Registration Portal - <https://evv-registration.sandata.com/vendor-registration>

What is needed to successfully register?

- At least one provider in the state must have listed your organization as their Alt EVV vendor of choice, in their provider registration with Sandata

Why is vendor registration required?

- Registering provides vendors with credentials for interface testing
- Vendors will have access to the Alt EVV specifications
- Upon completion of testing, vendors can access production credentials to send data for the provider agencies they support

Sandata
Get more right from the start

EVV Vendor Self-Registration

What vendor organization are you with?

SELECT YOUR VENDOR ORGANIZATION *

ENTER THE EMAIL ADDRESS YOU USE AT YOUR ORGANIZATION *

My organization is not listed

Continue Registration

Alt EVV Vendor Registration Common Questions

Q: If a vendor is already in the Sandata system, do I still have to submit their information?

- ▶ A: Please submit their information when your agency registers. The certification process is unique for each state.

Q: Can our agency send the data in from our vendor, or does it need to come from our alternate vendor?

- ▶ A: Any Vendor may go through the process to become certified to send visit data. Reach out to your Vendor to ask them if they plan on becoming certified for Massachusetts.

Q: Different vendor credentials are needed for each providers portal, but all can be sent via API using one setup, correct?

- ▶ A: The Alt EVV vendor must generate production credentials for each PIDSL (ProviderID). All data is sent to the appropriate endpoints (clients, employees, visits). Endpoints are documented in the specifications.

Q: Can you find out if the vendor has registered and has been certified?

- ▶ A: During the provider registration, if the provider indicates they will be using Alt EVV, a list of vendors will be available. The list are vendors which have a relationship with Sandata. Each vendor must certify separately, one time, for the MassHealth program.



Alt EVV Spec Updates



Alternate EVV Specification Updates

- ▶ Clarification: Only 1 BypassReason value can be submitted, when the following client verification field(s) are false:
 - ▶ ClientVerifiedTimes
 - ▶ ClientVerifiedService
 - ▶ Both ClientSignatureAvailable and ClientVoiceRecording
- ▶ Added Appendix 6.3 PAYER PROGRAM MAPPING
 - ▶ This is a line item for each payer and program combination
- ▶ ClientAddress Segment is required
- ▶ Commonwealth of Massachusetts Alternate EVV Technical Specifications are updated:
 - ▶ <https://sandata.zendesk.com/hc/en-us/articles/28556602735379-Commonwealth-of-Massachusetts-Alternate-EVV-Technical-Specifications>
- ▶ More information is included in the Specification User Guide in Sandata On-Demand:
 - ▶ <https://sandata.zendesk.com/hc/en-us/articles/15663917463315-Sandata-Specification-User-Guide>

Alternate EVV Specification Common Questions (Cont'd)

Q: When will the Massachusetts Alt-EVV specifications be provided?

- ▶ A: The Massachusetts Alt-EVV specifications are reviewed during townhalls hosted by Sandata. For information, check Sandata's Alternate EVV [Technical Specifications](#)

Q: If my agency currently has an EMR system that records attendance verification, can we compile the data and submit it in bulk in Sandata?

- ▶ A: The Alt EVV vendor can send many records in 1 API transmission to the Sandata EVV Aggregator.

Q: When using an Alt EVV system, and the data is sent into the Sandata portal, why can't changes be made within the SDD portal?

- ▶ A: The reason is that it is expected that the Alternate EVV Vendor system is the source of truth for information collected via Alternate EVV. Therefore, an Agency doesn't have to maintain two systems. They just maintain one and Sandata will reflect the changes once new data for a visit is received

Alternate EVV Specification Common Questions (Cont'd)

Q: Can you start as an ALT EVV registration and then change to SMC at a later date?

- ▶ A: Yes, if the provider will be changing solutions, or Alt EVV vendors, please submit a Sandata support ticket request for assistance with this change.

Q: What does the data actually look like that is gathered and sent to Sandata? Is it an excel file or some other type of spreadsheet format?

- ▶ A: Alt EVV Vendors may send data to Sandata using a JSON format over an API.

Q: We are going to be using two separate alt EVV vendors. Are we able to register with vendors with one PIDSL #?

- ▶ A: Each PIDSL/SL # can register only one time, in the Registration Portal. Please submit a Sandata support ticket to register a second vendor. Please note the registration is adding an Alt EVV vendor.

Alternate EVV Specification Common Questions

Q: If the alternate EVV is registered, do the separate agencies have to register also?

- ▶ A: Each agency has to register in the Provider Registration Portal.

Q: If an EMR full integration is not available, can a file be daily uploaded into Sandata for patients to be seen that day?

- ▶ A: If an agency chooses Sandata EVV, clients are fed into the system from the state. There is no daily upload capability for EVV data available other than the Alt EVV interface.

Q: How frequently does the data for an alternate EVV need to be sent through the aggregator?

- ▶ A: An Alt EVV vendor is expected to send data at least once daily.

Provider Agency & Alternate EVV Training



What provider agency training is available?

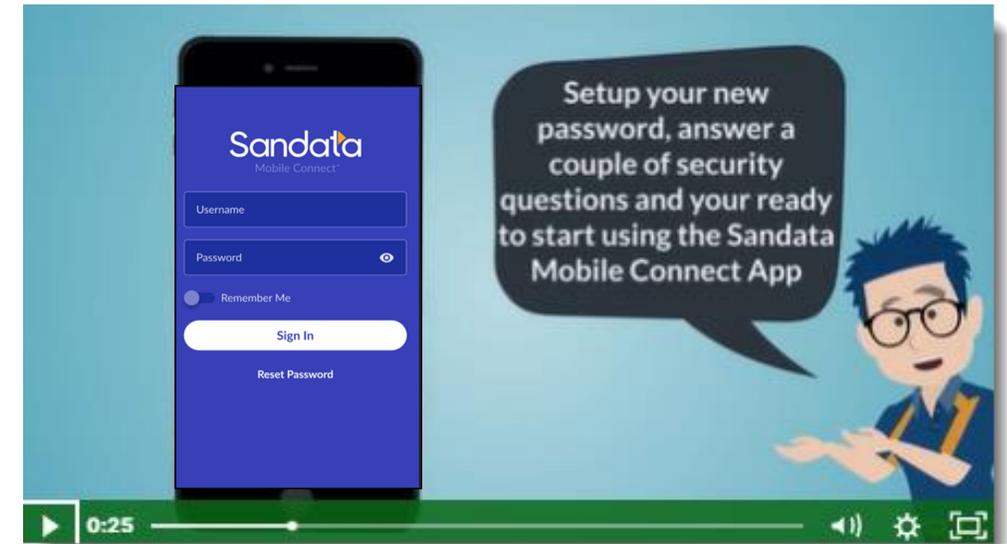
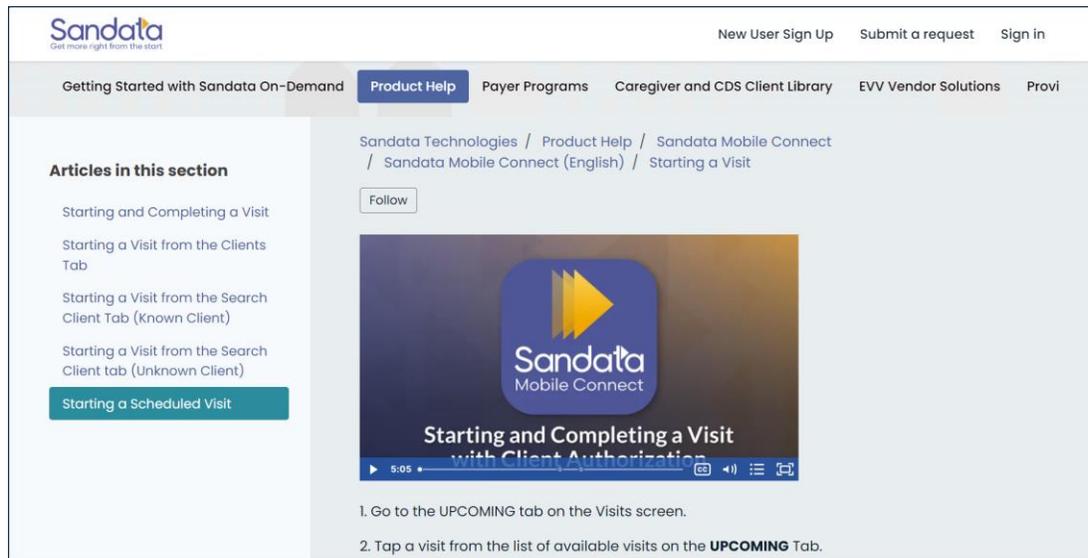
1. Online Course for Provider Agency Administrators (2 hours)
2. Online Courses for Provider Agency Admins and Staff (Self-Paced)
3. Virtual Instructor-Led Training Sessions
4. Access to Video Library and Guides in Sandata On-Demand



Sandata On-Demand

Self-serve access to state-specific resources

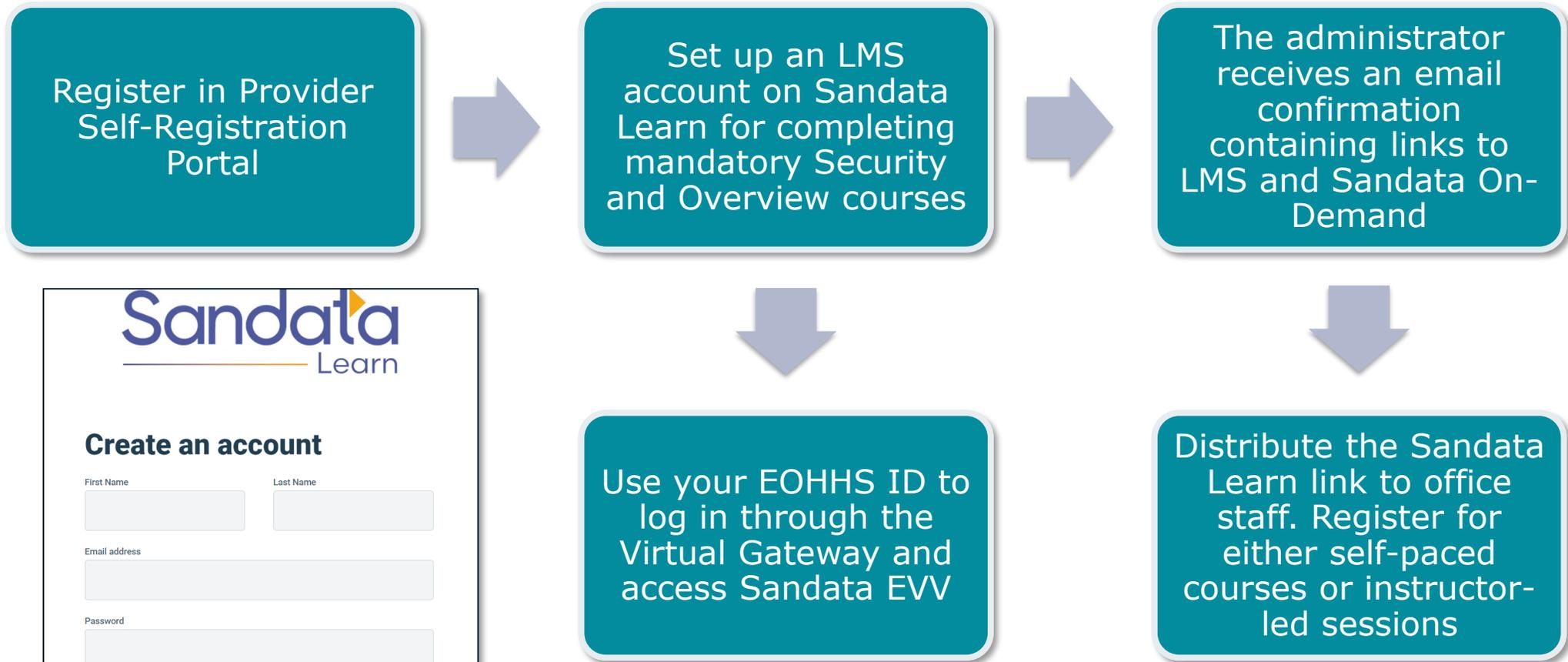
- Guides and Instructional Videos
- Customer Support
 - <https://sandata.zendesk.com/hc/en-us>



Caregiver Library for Provider Agency Employees

- Videos and guides
- Visit Capture: Mobile Application
- No login required

Provider Agency Administrator Roadmap



The screenshot shows the Sandata Learn registration page. It features the Sandata Learn logo at the top. Below the logo is the heading "Create an account". The form includes input fields for "First Name", "Last Name", "Email address", and "Password". A blue "Sign Up" button is positioned below the password field. At the bottom of the form, there is a line of text: "By submitting this form you agree to the Terms of Use" and a link that says "Click here for Support".

Office Staff Training Roadmap

Table of Contents
List of activities in this course

- INTRODUCTION
 - Introduction to Scheduling
- HOW TO CREATE A SCHEDULE
 - The Steps to Create a Schedule
 - Creating a Schedule: Practice**
- HOW TO CREATE A SCHEDULE TEMPLATE
 - Recurring Schedule Templates
- HOW TO EDIT A SCHEDULE
 - Editing a Schedule: Practice
 - Knowledge Check 1

Creating a Schedule: Practice
You're turn! Use the tutorial below to practice creating a schedule in Sandata Fuse.
(Hint: you can make the tutorial full screen using the **Full Screen** option. To leave Full Screen mode, press the escape button on your keyboard.)

Click

Let's create a schedule! The first step is to select the

Receive the Sandata Learn link from the agency administrator



Create an LMS account in Sandata Learn



Enroll in either self-paced or instructor-led courses on Sandata Learn

What Alternate EVV Aggregator Training is available?

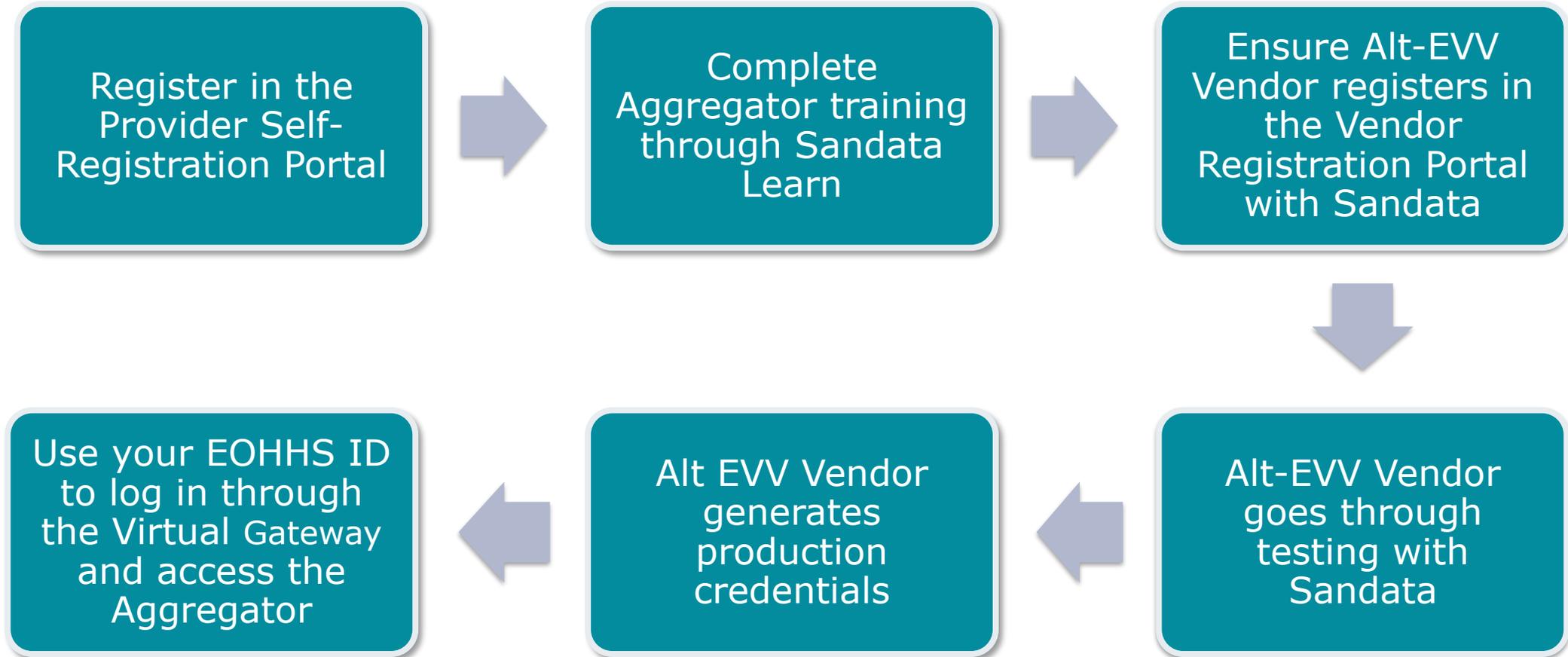
1. Online Course for Provider Agency users

2. Virtual Instructor-Led Training for State Entity Users

3. Access to Video Library and Guides in Sandata On-Demand



Alt-EVV Agency Administrator Roadmap



Sandata Learn Demo





Today's Questions



Next Steps



MA EOHHS Ready, Set, Go Checklist

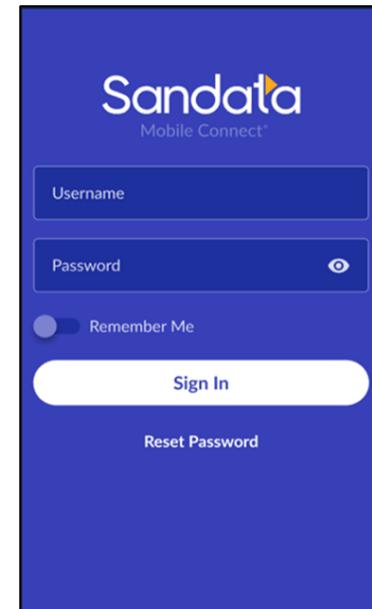


Ready, Set, Go Checklist for Provider Agencies Using Sandata EVV

- 1. Assign** a primary user as the Security Admin for Sandata EVV
- 2. Obtain** Provider ID and Service Location (PIDSL) Number:
 - Access via [MassHealth Provider Portal](#)
 - Use [Provider Online Service Center](#)
- 3. Complete** Sandata EVV registration - Use [Provider Self-Registration Portal](#)
- 4. Submit** [agency-based EVV User Request Form \(URF\) for SSO Credentials](#)
 - Use MyMassGov email for both Sandata Self registration and URF submission
- 5. Complete required admin training**
- 6. Ensure** employees complete agency training and download the SMC app
- 7. Enroll** in [Sandata Learn](#) for Aggregator and other training modules
- 8. Access** your Welcome Letter with Sandata EVV system credentials through [eTrac](#)
- 9. Add** employees in Sandata EVV by logging in to [VG Gateway](#)
- 10. Grant** SMC app access to employees
- 11. Encourage** Usage - Employees begin capturing visits

Ready, Set, Go Checklist for Employees using SMC App

- 1. Complete** agency training in Sandata On-Demand – [Caregiver Library](#)
- 2. Download** the Sandata Mobile Connect (SMC), [Google](#) or [Apple](#) stores
- 3. Log in** to the Sandata SMC app or an Alt EVV Vendor EVV application
- 4. Begin** capturing the 6 required EVV elements for each EVV eligible client visit
 - **Lookup** client information
 - **Clock-In** to begin capturing the visit start time
 - **Select** the services being performed
 - **Add** the visit location
 - **Capture** client verification
 - **Clock-Out** to capture the visit end time



Ready, Set, Go Checklist for Provider Agencies Using an Alternate EVV Vendor

- 1. Assign** a primary user as the Security Admin for Sandata EVV
- 2. Obtain** Provider ID and Service Location (PIDSL) Number:
 - Access via [MassHealth Provider Portal](#)
 - Use [Provider Online Service Center](#)
- 3. Complete** Sandata EVV registration - Use [Provider Self-Registration Portal](#)
- 4. Submit** [agency-based EVV User Request Form \(URF\) for SSO Credentials](#)
 - Use MyMassGov email for both Sandata Self registration and URF submission
- 5. Complete required admin training**
- 6. Enroll** in [Sandata Learn](#) for Aggregator training.
- 7. Add** employees in Sandata EVV by logging in [VG Gateway](#)
- 8. Monitor** the vendor credentialing process to ensure your Alt EVV vendors completes testing to gain access to production credentials.
- 9. Begin** capturing visits using the Alt EVV vendor's application
- 10. Check** Sandata Aggregator for visit data submitted by your Alt EVV vendor

EVV Helpful Links

Getting Started Links

- ▶ [Provider Self-Registration Portal](#)
- ▶ [User Request Form \(URF\) for Virtual Gateway access](#)
- ▶ [Vendor Self-Registration Portal](#)
- ▶ [Sandata Learn](#)
- ▶ [Sandata Mobile Connect \(SMC\) from Google Play Store](#)
- ▶ [Sandata Mobile Connect \(SMC\) from Apple Store](#)
- ▶ [Virtual Gateway page for SSO Login](#)

Resource Links

- ▶ Provider ID & Service Location(PIDSL) #:
 - ▶ Access via [MassHealth Provider Portal](#)
 - ▶ Use [Provider Online Service Center](#)
- ▶ [Sandata On-Demand](#) or call 833.511.0164 for Sandata EVV and Alt EVV Technical Support
- ▶ [MA-EOHHS EVV Website](#) - Visit for EVV program details
- ▶ [Sandata On-Demand](#) – Visit for training resources
- ▶ EVVfeedback@Mass.gov – Use to submit general EVV Program questions



Thank you for attending today's town hall!

