



# Sandata EVV Enhanced New UI Guide

January 27, 2025

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## Overview

This document covers the high-level changes made to the User Interface (UI) of the Sandata EVV portal. While the look is new, most of the functionality across the system remains the same. Our new UI is a modern EVV software solution, combining the functionality of our existing platform, with a solution that is modern, scalable, and reliable.

You'll discover the following in Sandata EVV Enhanced:

- Modern look and feel
- Workflows are simplified with fewer clicks for key tasks
- ADA compliance retained
- Easy to find information
- Old-style search wizards removed
- Filters are easier to use

This document is intended for a general audience of Sandata EVV users and uses the Standard Configuration. Your state or payer may utilize a different configuration in the platform.

This document intends to highlight the enhanced look and feel of Sandata EVV. Upgrades are highlighted in each of the sections, starting with Navigation.

# Navigation

Notice the **Naviation** menu has the same look and feel, making it easy for your to navigate to each Sandata EVV module.



Figure 1. Navigation Menu

# The Dashboard

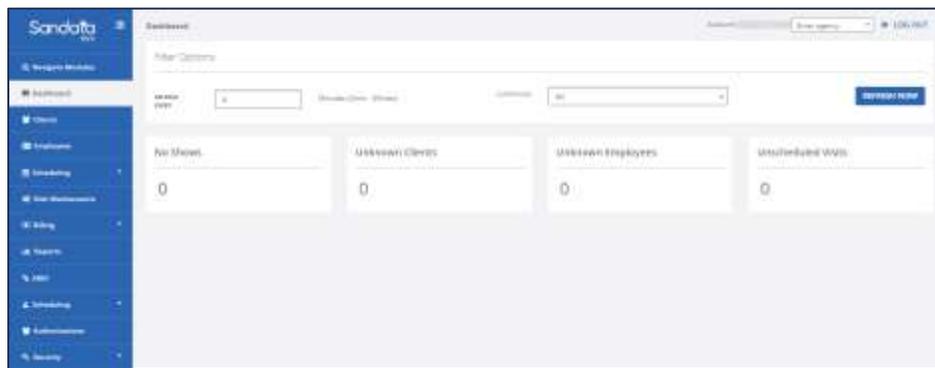


Figure 2. Former Dashboard

The landing page **dashboard** has a new look, with snapshots of visit exceptions and visit statuses to guide users on steps to take in the **Visit Maintenance** module.

Visit exceptions display by color and type, and can be filtered up to the last seven days. The list on the left are the types of visit exceptions in the past seven days. Exceptions shown will be specific to your program. On the right, a chart shows exception count by day displays, based on the chosen date range.

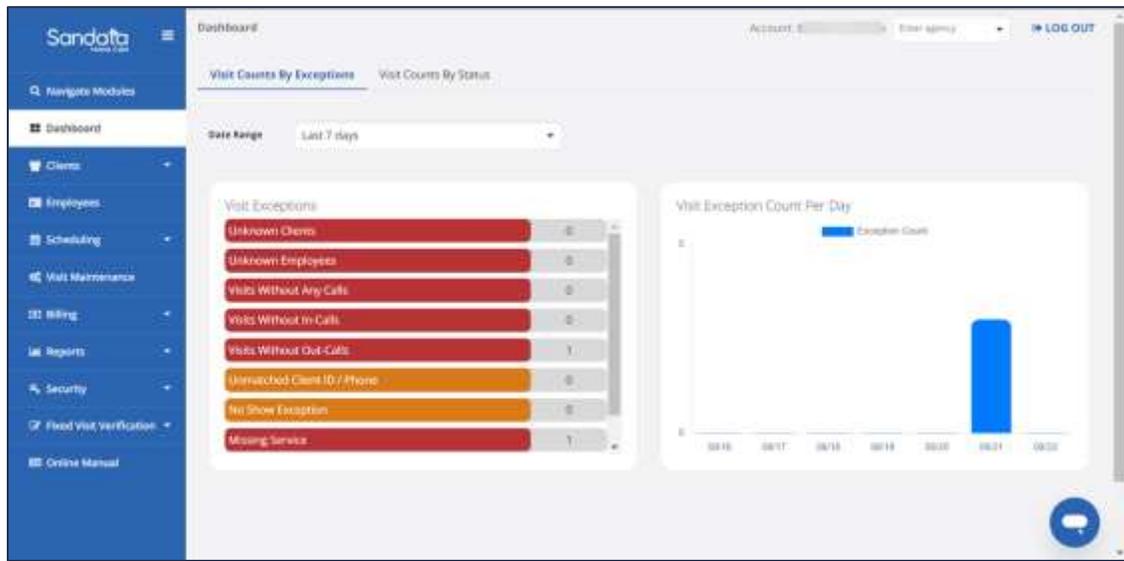


Figure 3. New Dashboard/Landing Page

There are two tabs for viewing, with **Visit Counts by Exceptions** being the default. The tab **Visit Counts by Status** is also new. A single day can be selected for the date range, which will include overnight visits from the previous day. Again, the types of visit statuses shown will be specific to your program.

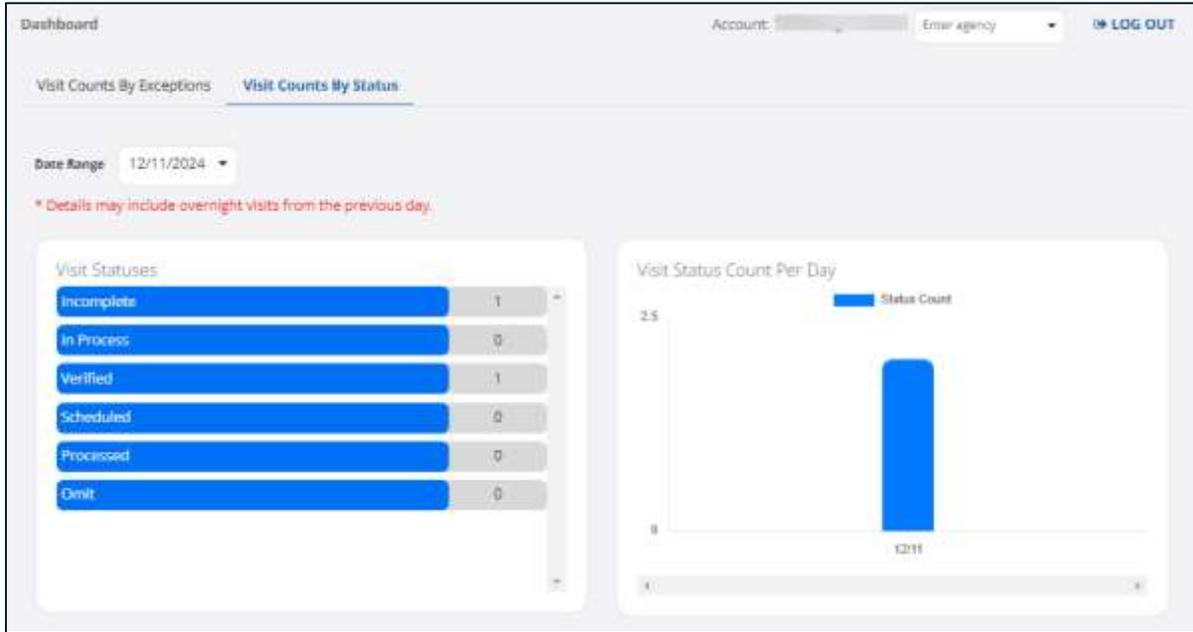


Figure 4. Visit Counts by Status Dashboard

# Key Differences in the Updated UI

## Module Data Auto Loads

When you visit a module, the data for that module automatically loads. Previously users had to search first to see data for that module. This feature is implemented in the following modules: **Clients, Employees, Schedules, Visit Maintenance, and Security.**

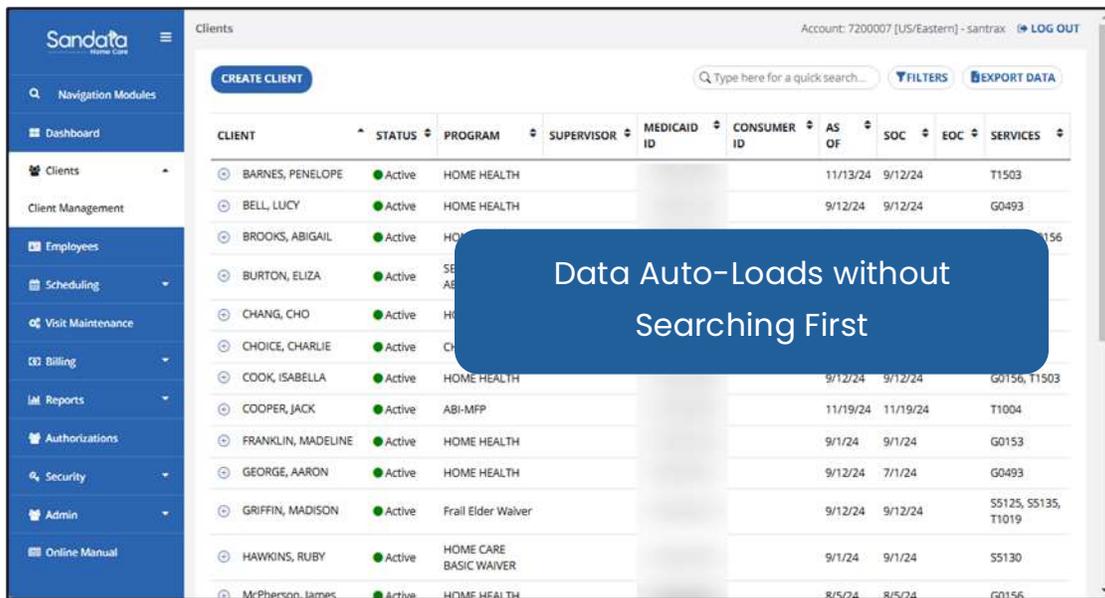


Figure 5. Client Management Screen

## Quick Search Field

The quick search field is new and is at the top of the screen on the right, next to **FILTERS**. When you want to find a client or employee, just start typing in the name and the results will appear in the data grid.

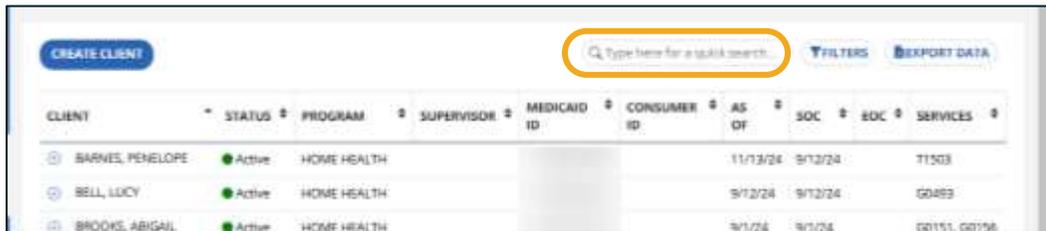


Figure 6. Quick Search Field

While the quick search helps you find a client fast, the **FILTERS** feature allows you to search by a number of parameters or groups of individuals, like all clients in a pending status.

This filter function is found in the **Client**, **Employee**, and **Scheduling** modules.

From there, the new **FILTERS** field will allow you to refine your search with a new easy to use format.



Figure 7. Location of Filters Button on Page

## Export Data

The **EXPORT DATA** feature is a popular reporting tool and has a new look. In the modules with this feature, once the filters are selected users can choose **EXPORT DATA** and choose the type of file to produce a report based on the filtered criteria.



Figure 8. Export Data Options

## Client Module

In the **Navigation** menu, users will use the arrow on **Clients**, then select **Client Management** to go to the **Client Module**.

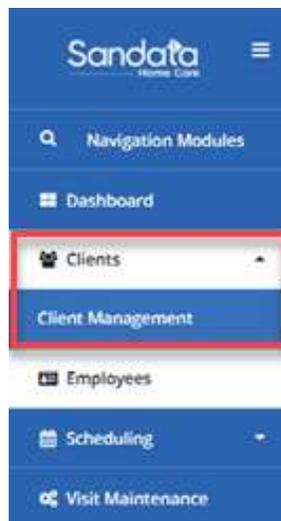


Figure 9. Client Management Menu Option

Users will see the list of Active clients in the system. No need to search first to view your list of active clients.

The **Quick Search** field enables users to search quickly for a client by name.

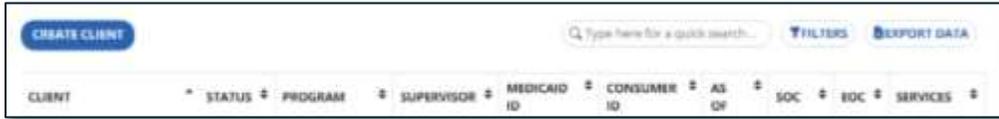


Figure 10. Quick Search Field

## Advanced filters

You can use the fields in the enhanced Filters to view lists of clients. For example, you can search by **Client Status** (Active, Pending, or Inactive), and by **Program** and by **Payer**, among other search fields.

A screenshot of a 'Filters' dialog box. The dialog has a title bar with the word 'Filters' and a close button (X). Inside the dialog, there are several input fields and dropdown menus. The fields are: 'Last Name' (text input), 'First Name' (text input), 'Status' (dropdown menu), 'Client ID' (text input), 'Client Payer ID' (text input), 'Medicaid ID' (text input), 'Program' (dropdown menu), 'Language' (dropdown menu), and 'Primary Payer' (dropdown menu). At the bottom of the dialog, there are two buttons: 'CLEAR' and 'APPLY FILTERS'.

Figure 11. Filter Options

## Client Details

Selecting a client will take you to the **Edit Client** page. Their name and program status is prominently displayed at the top with a line just below displaying their **Client ID**, **Medicaid ID**, **Address**, **Phone number**, and **Main Emergency Contact** (if entered).



Figure 12. Client Details

In the **Personal** tab, essential details appear in the **Identifiers**, **Personal Information**, **Address|Phone Numbers**, and **Contacts Card**. Edit or add information here.

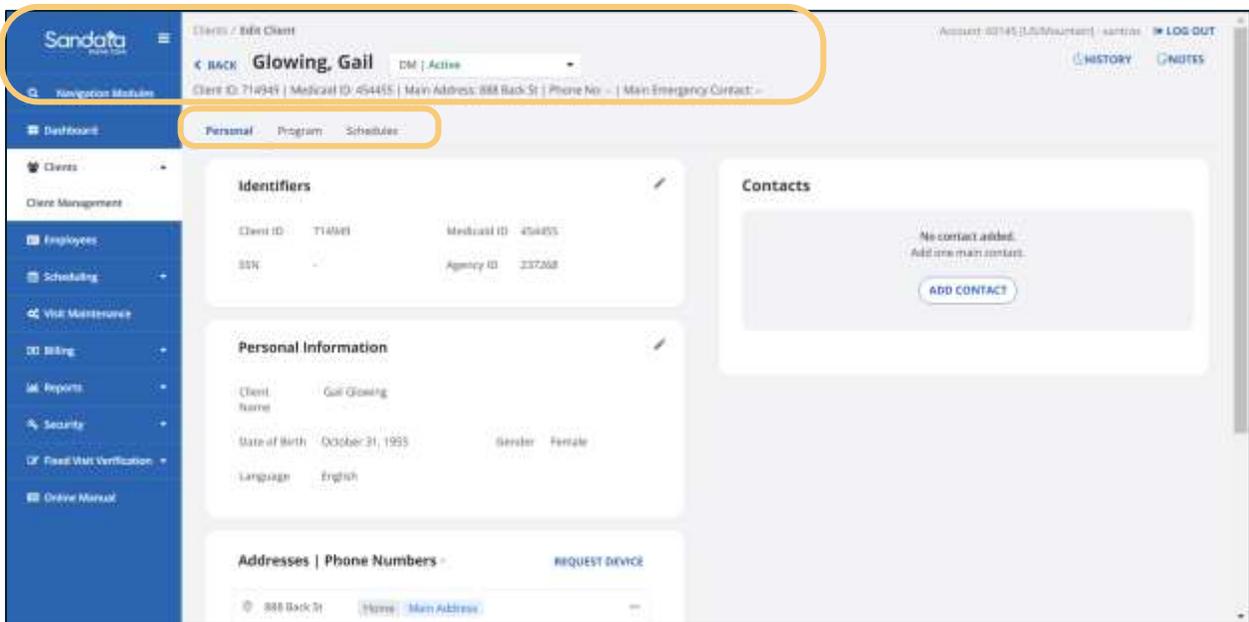


Figure 13. Edit Client Screen with Name and Essential Details at the Top

## Client Program Tab

Program, Service, and Payer details are now easy to view and edit in the **Program tab**. Notice that **Authorizations Details** are now available for viewing and editing in the program tab. No need to navigate to a separate module! Adding and editing authorizations is now done in the client module.

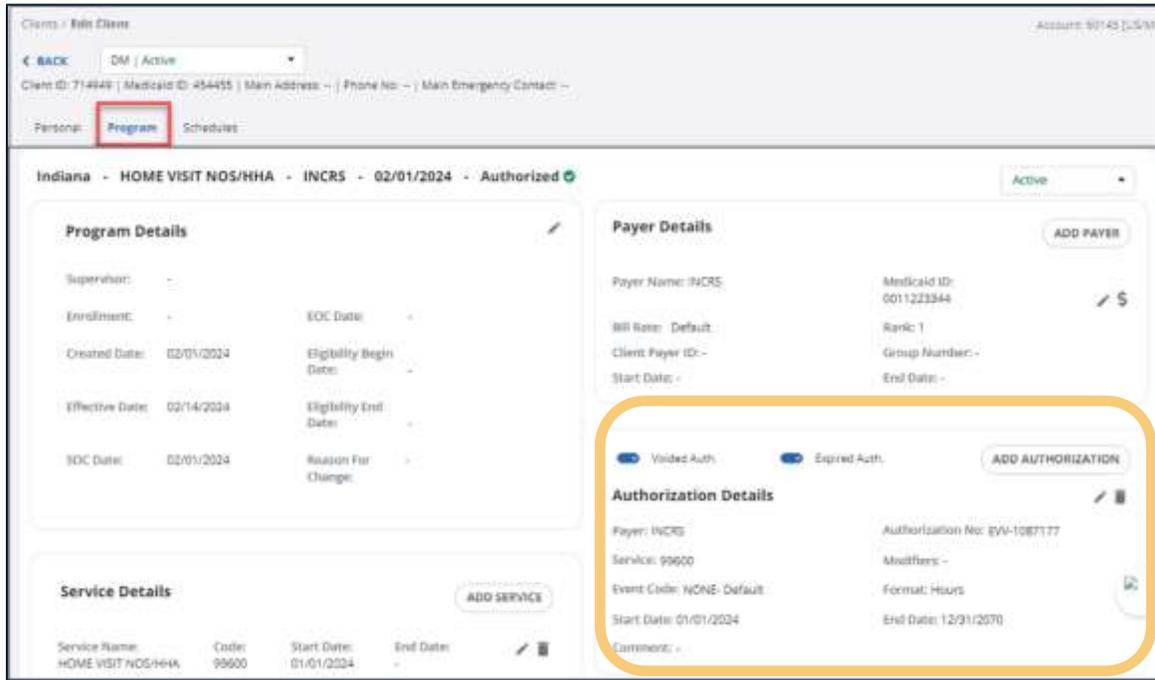


Figure 14. Authorization Details in Client Program Tab

## Create Client

The **Create Client** button brings a new first window to enter basic required information, such as **Last Name**, **First Name**, **Program**, **Payer**, and **Medicaid ID**. This will create the client record, allowing users to add additional information in the **Personal** and **Program** tabs. Some programs will use this feature to do a **Client Lookup** from a Program feed.

The screenshot shows a 'New Client' form with the following fields and values:

- \*Required** (header)
- Last Name\***: Test
- First Name\***: Test
- Program\***: AHCCCS
- Payer\***: AZACH
- Medicaid ID\***: 6546487654654
- SSN**: \_-\_-
- Phone**: ( ) \_-\_-

At the bottom of the form, there are two buttons: **CANCEL** and **CREATE CLIENT**.

Figure 15. New Client Form

## Employee Module

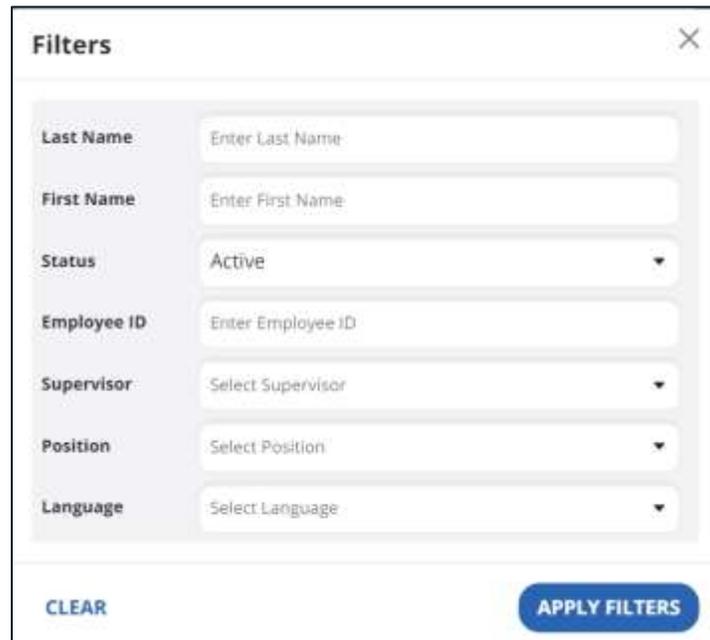
Like in the **Client module**, Employees will automatically load when users land on the **Employee module**. The current default view is for Active Employees.

The **Quick Search field** enables users to search quickly for a employee by name.



Figure 16. Quick Search in Employee Module

Like the **Client** module, the **Employee** module also features the easy-to-use advanced **Filters** that provide the following search fields beyond name: **Status**, **Employee ID**, **Supervisor**, **Position**, and **Language**. The default view will be for Employees that are in Active status.



The screenshot shows a 'Filters' window with a close button (X) in the top right corner. The window contains the following fields:

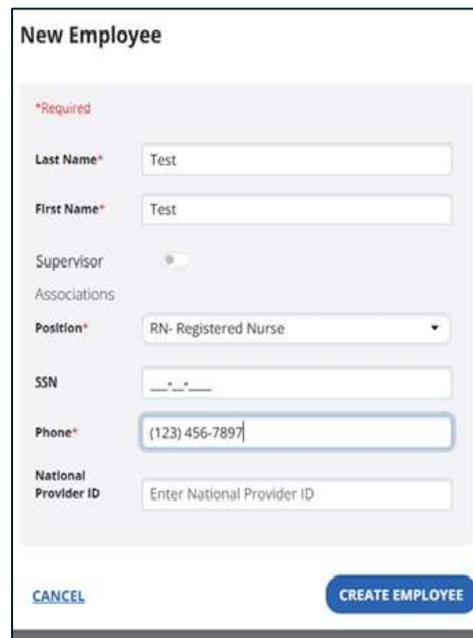
- Last Name:** Enter Last Name (text input)
- First Name:** Enter First Name (text input)
- Status:** Active (dropdown menu)
- Employee ID:** Enter Employee ID (text input)
- Supervisor:** Select Supervisor (dropdown menu)
- Position:** Select Position (dropdown menu)
- Language:** Select Language (dropdown menu)

At the bottom of the window, there are two buttons: a blue 'CLEAR' button on the left and a blue 'APPLY FILTERS' button on the right.

**Figure 17. Employee Filters Window**

## Create Employee

An easy to use **New Employee pop-up window** appears when users select **CREATE EMPLOYEE**. The minimum required fields are labeled with an asterisk and are **First Name**, **Last Name**, **Position**, and **Phone Number**. Some programs have other requirements, such as **SSN**.



The screenshot shows a 'New Employee' form with the following fields and values:

- Last Name\***: Test
- First Name\***: Test
- Supervisor**: [Toggle Switch]
- Associations**:
  - Position\***: RN- Registered Nurse
- SSN**: [Masked: --- --]
- Phone\***: (123) 456-7897
- National Provider ID**: Enter National Provider ID

Buttons: CANCEL, CREATE EMPLOYEE

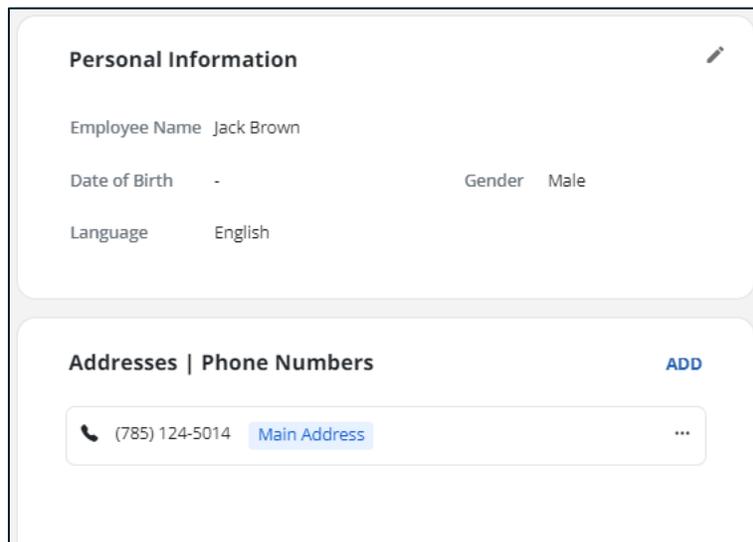
Figure 18. Create Employee Screen

Once the employee record is completed, users can go into the **Employee record** to complete other fields, such as **address**, **email address**, **mobile user access**, and **contacts**.

## Mobile User Access Button

The **mobile user check box** is now in the **employee address box**. This is a check box to provide employee and caregiver access to the mobile app.

To add the mobile user access after the employee is already in the system, use the ( ...) **menu** to edit the main address. There you will see the **mobile user check box**, with a requirement to enter the employee's email address.



The screenshot shows a user interface window divided into two sections. The top section is titled "Personal Information" and contains the following fields: "Employee Name" with the value "Jack Brown", "Date of Birth" with a hyphen "-", "Gender" with the value "Male", and "Language" with the value "English". There is a small edit icon in the top right corner of this section. The bottom section is titled "Addresses | Phone Numbers" and has an "ADD" button in the top right corner. It contains a single entry for a phone number: "(785) 124-5014". This entry has a "Main Address" label and a three-dot menu icon to its right.

Figure 19. Address and Phone Numbers Window

**Edit Address and Phone Number**
✕

\* Required

Address Label

Address Line 1

Address Line 2

Address Type

Zipcode

City

County

State

Mobile Phone Number\*

Email Address\*

The Email address is required.

Use as main address

Mobile user

+ Add number

CANCEL

RESET MOBILE USER PASSWORD
SAVE

Figure 20. Email Address Required Field

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Employees > Edit Employee
Account: 60145-305/Mountain | [Logout](#)

< BACK
**Day, Sunny**

[HISTORY](#)
[NOTES](#)

Employee ID: 888502 | Phone No: (772) 237-9618 | Email Address: -- | Main Emergency Contact: --

**Personal** | Schedule

**Identifiers**

SSN	*****		
Status	Active	Effective Date	Aug 7, 2024
Employee ID/PIN	888502	Position	CGV-Caregiver
Hire Date	Aug 7, 2024	Supervisor	-
Supervisor Code	-	National Provider ID	-
Alternative Provider ID	088502	Registry ID	-

No contact added.  
Add one main contact.

ADD CONTACT

Figure 21. New Employee View with Personal Identifiers and Contacts

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# Visit Maintenance

In the **Visit Maintenance Module**, users will now see the auto-loading visit grid. Visits will show by the default date range which is typically the same day.

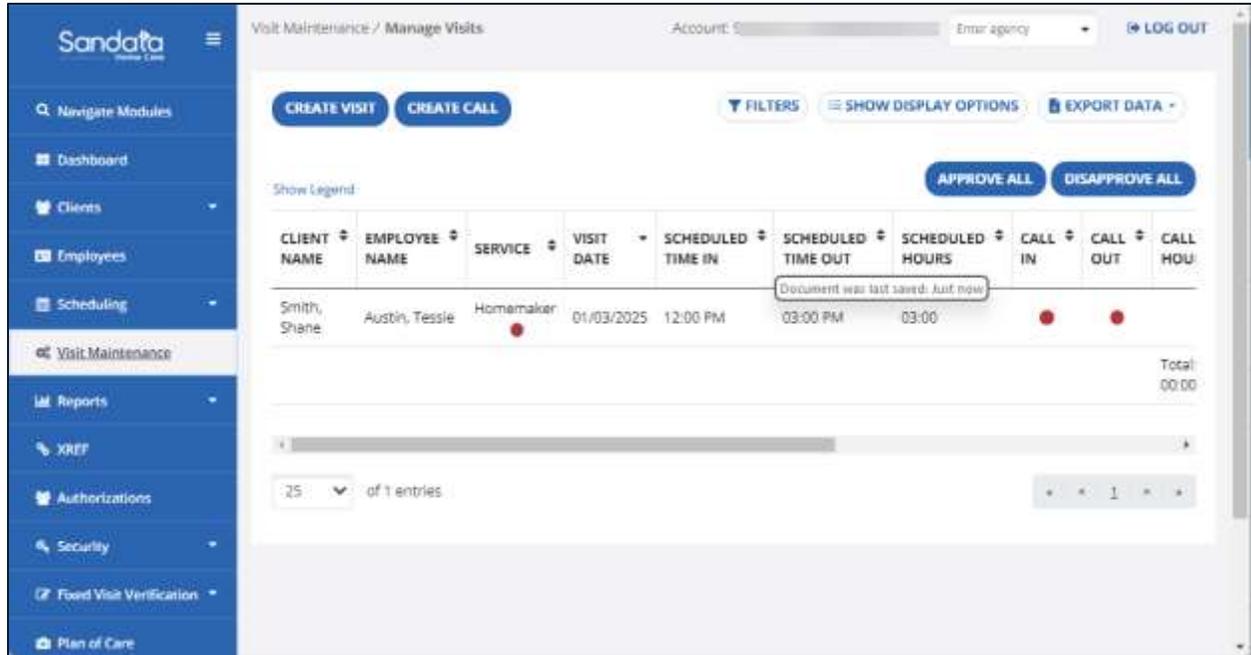


Figure 22. Visit Maintenance Module View

## Easy-to-use Visit Search

To see visits by a specific date range, or to filter by **Visits with Exceptions**, use the updated **FILTERS**.

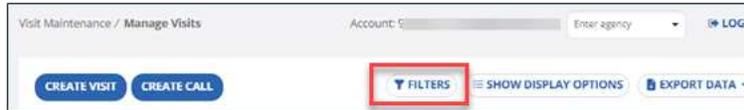


Figure 23. Filter Button in Visit Management

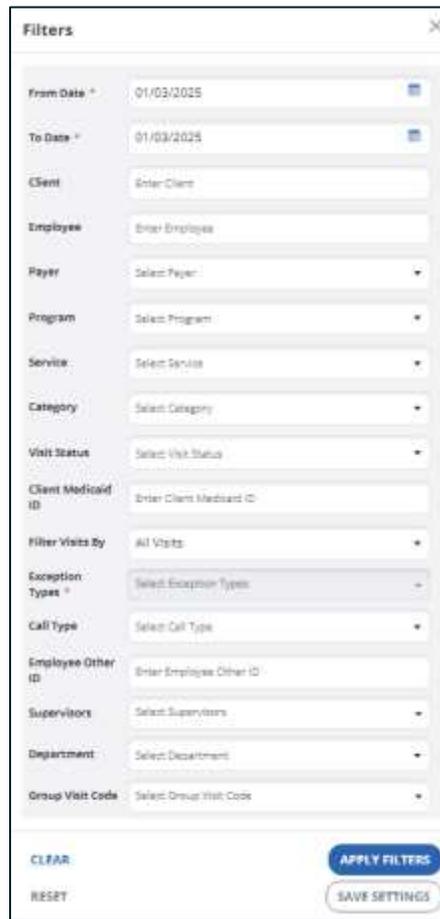
A screenshot of the 'Filters' window in the Visit Maintenance system. The window has a title bar with 'Filters' and a close button. It contains a list of filter fields, each with a label and a value field. The fields are: 'From Date' (01/03/2025), 'To Date' (01/03/2025), 'Client' (Enter Client), 'Employee' (Enter Employee), 'Payer' (Select Payer), 'Program' (Select Program), 'Service' (Select Service), 'Category' (Select Category), 'Visit Status' (Select Visit Status), 'Client Medicaid ID' (Enter Client Medicaid ID), 'Filter Visits By' (All Visits), 'Exception Types' (Select Exception Types), 'Call Type' (Select Call Type), 'Employee Other ID' (Enter Employee Other ID), 'Supervisors' (Select Supervisors), 'Department' (Select Department), and 'Group Visit Code' (Select Group Visit Code). At the bottom of the window, there are four buttons: 'CLEAR', 'RESET', 'APPLY FILTERS', and 'SAVE SETTINGS'.

Figure 24. Filters Window in Visit Maintenance

## Create Visit Button

Some programs will now see a **Create Visit** Button on the **Manage Visit** screen next to the **Create Call** button. Use **Create Visit** to create a manual visit where both the call in and call out were missed.

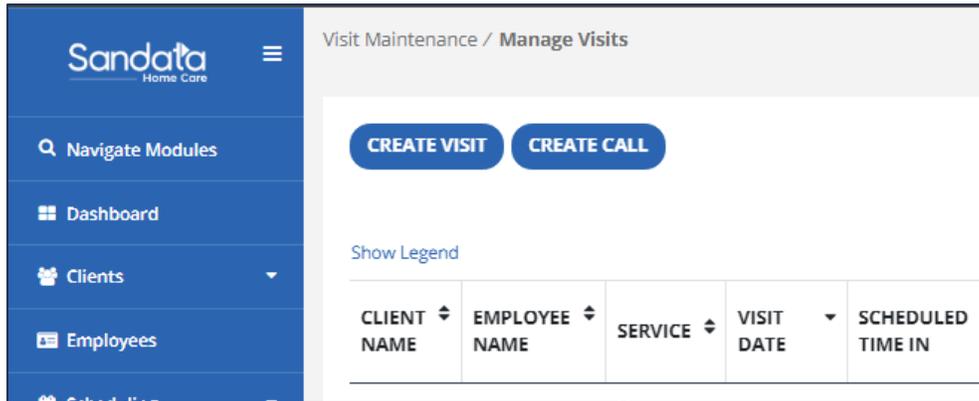


Figure 25. Create Visit and Create Call Buttons

After choosing **Create Visit**, the system will guide the user through the needed information for the visit, including **Client**, **Employee**, **Date**, **Times**, and **Services**.

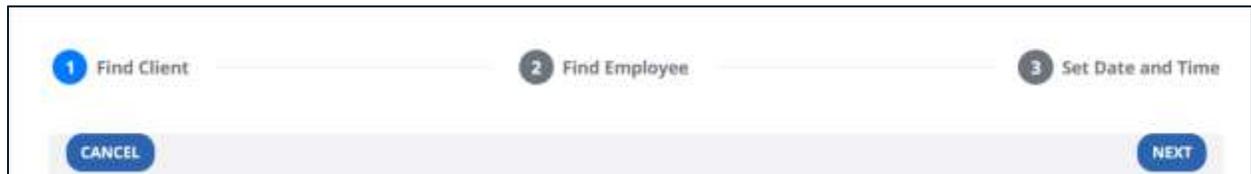
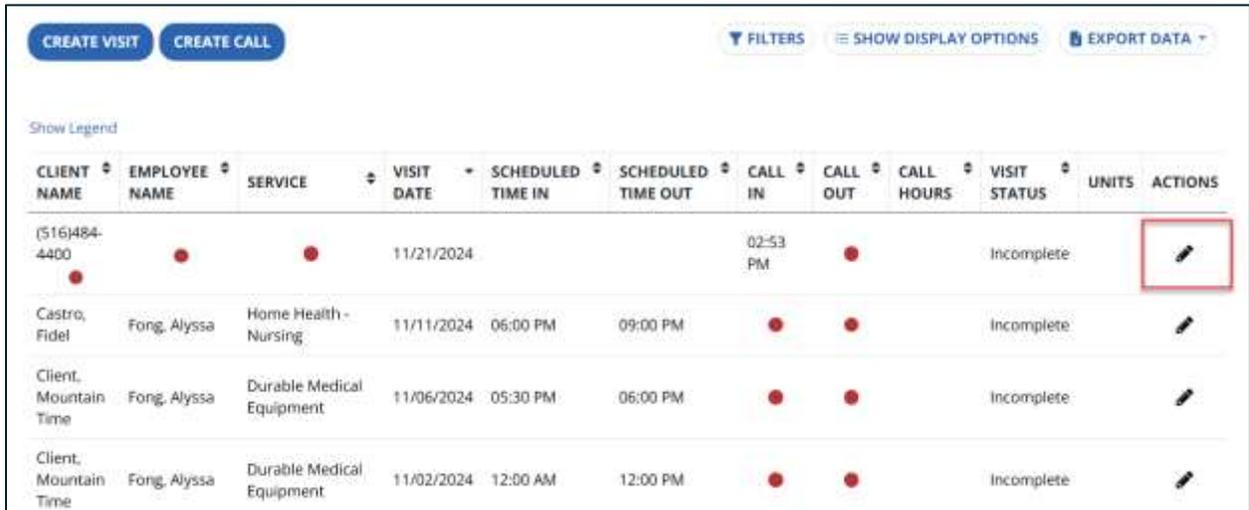


Figure 26. Visit Information Progress View

## Visit Details Page

The prior **Visit Details** page had tabs going down the left side. The new page uses much more of the screen real estate with the tabs across the top, mirroring tab design in other modules. Users will land on this page by either selecting an exception dot on the **Visits Grid**, or by selecting the edit visit icon.

Data can be sorted by selecting the **Column Header** to sort by that field.



The screenshot shows a web interface for managing visits. At the top, there are buttons for 'CREATE VISIT' and 'CREATE CALL', along with 'FILTERS', 'SHOW DISPLAY OPTIONS', and 'EXPORT DATA'. Below these is a 'Show Legend' link. The main content is a table with the following columns: CLIENT NAME, EMPLOYEE NAME, SERVICE, VISIT DATE, SCHEDULED TIME IN, SCHEDULED TIME OUT, CALL IN, CALL OUT, CALL HOURS, VISIT STATUS, UNITS, and ACTIONS. The first row of data is highlighted, and its 'ACTIONS' cell contains an edit icon (a pencil) which is enclosed in a red rectangular box. The other rows also have edit icons in their 'ACTIONS' cells.

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	CALL IN	CALL OUT	CALL HOURS	VISIT STATUS	UNITS	ACTIONS
(516)484-4400			11/21/2024			02:53 PM			Incomplete		
Castro, Fidel	Fong, Alyssa	Home Health - Nursing	11/11/2024	06:00 PM	09:00 PM				Incomplete		
Client, Mountain Time	Fong, Alyssa	Durable Medical Equipment	11/06/2024	05:30 PM	06:00 PM				Incomplete		
Client, Mountain Time	Fong, Alyssa	Durable Medical Equipment	11/02/2024	12:00 AM	12:00 PM				Incomplete		

Figure 27. Edit Visit in Visit Grid

Selecting exception dots will take the user to the tab where the missing or incorrect data needs to be entered. In Figure 28, clicking on the missing call in takes the user to the **Call Log** tab.

The screenshot displays the 'Visit Maintenance / Visit Details' interface. At the top, it shows 'Account: €' and 'Enter agency'. Below this, there is a navigation bar with a '< BACK' button and 'Visit From Date: 11/11/2024'. The client information is listed as 'Client ID: 317139 | Client Name: [redacted] | Medicaid ID: 234245 | Employee ID: 121708 | Employee Name: Fong, Alyssa'. A horizontal menu contains several tabs: 'General', 'Client', 'Employee', 'Call Log' (which is highlighted with a red box), 'Merge Calls', 'Tasks', 'Exceptions', 'GPS', 'Memo', 'Claims', and 'History'. The main content area is titled 'Add Manual Call' and includes a red asterisk indicating required fields. The form contains four input fields: 'Call Date MM/DD/YYYY' (with a calendar icon), 'Call Time HH:MM AM/PM' (with a clock icon), 'Service' (a dropdown menu showing 'Select Service'), and 'Time Zone' (a dropdown menu showing 'US/Mountain'). Below these fields, there is a 'Reason Code' dropdown (showing 'Select Reason Code') and a 'Reason Note' text input (with 'Enter Reason Note' as a placeholder). A blue 'SAVE' button is positioned to the right of the 'Reason Note' field. Red error messages are visible below the 'Call Date' and 'Reason Code' fields, stating 'Call Date is required' and 'Reason Code is required' respectively.

Figure 28. Visit Details Screen with Tabs Across Full Screen for Resolving Exceptions

The **Exceptions** tab provides a list of exceptions for this visit that need to be fixed or acknowledged. Users can fix those in the **General** tab or tab related to that exception.

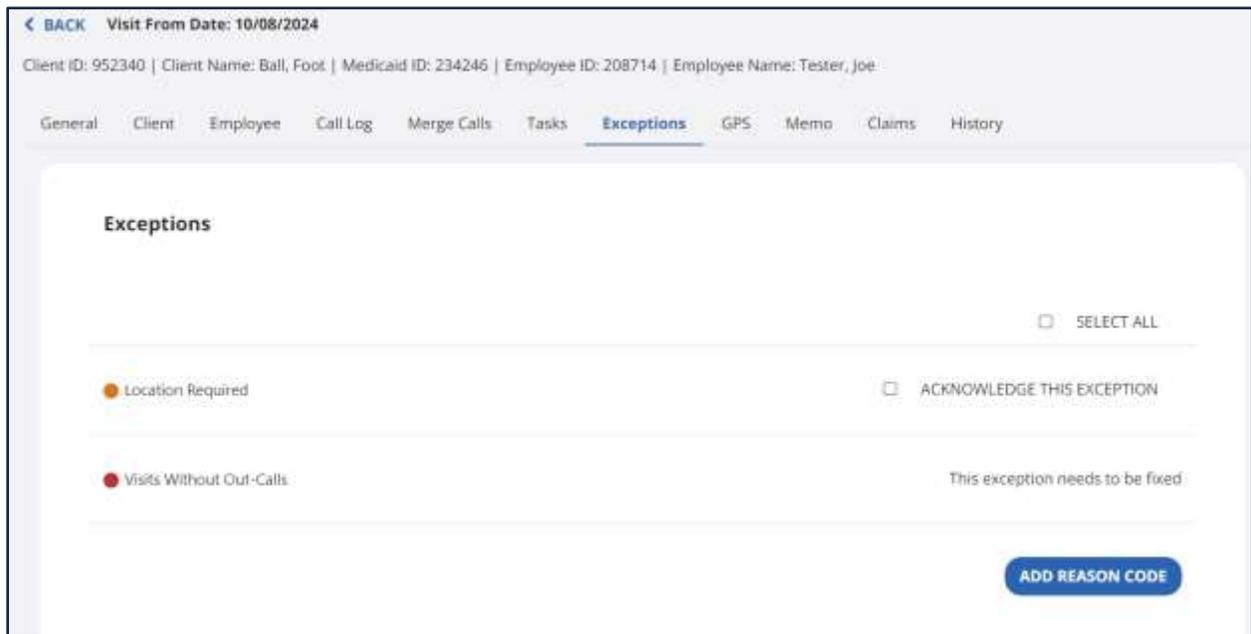


Figure 29. Exceptions Tab in Visit Details Screen

After resolving the visit exceptions, the **VISIT STATUS** should display as Verified and the visit is ready to be submitted for claims.

Show Legend

CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	VISIT STATUS	UNITS
Client, Mountain Time	Dunham, Sean	Durable Medical Equipment	10/28/2024				01:00 AM	01:30 AM	00:30	Incomplete	
Client, Mountain Time	Fong, Alyssa	Home Health - Basic	10/28/2024	12:00 PM	12:00 PM	24:00	08:00 AM			Incomplete	
Client, Mountain Time	Fong, Alyssa	Durable Medical Equipment	10/28/2024				10:36 AM	10:51 AM	00:15	Verified	
Client, Mountain Time	Fong, Alyssa	Durable Medical Equipment	10/28/2024				02:07 PM	02:29 PM	00:22	Verified	

**Figure 30. Visit List Showing Visit Status as Verified**

# Scheduling

Users that have scheduling as part of their program will see the **Scheduling module** has similarly updated UI, with the list of scheduled visits auto loading.

As shown below, the new quick filters are applied when entering the **Scheduling module**. Users can quickly adjust the **date range**, select a **client**, an **employee**, or a **visit status** to quickly find scheduled visits. Select the “x” to remove the loaded date range to view all scheduled visits.

The screenshot shows the Sandata Scheduling module interface. At the top, there is a navigation bar with the Sandata logo, a search bar, and a 'LOG OUT' button. Below the navigation bar, there is a 'CREATE SCHEDULE' button and a 'View Template Events Only' link. A search bar is also present. The main content area features a filter bar with the following options: 'Filter by: DATE RANGE: 09/02/2024 - 09/13/2024', 'CLIENT: \*', 'EMPLOYEE: \*', and 'STATUS: \* Clear All'. To the right of the filter bar, it says 'Total Scheduled Hours: 33.17'. Below the filter bar is a table with the following columns: DATE, CLIENT, CLIENT SUPERVISOR, PROGRAM, EMPLOYEE, EMPLOYEE SUPERVISOR, SERVICE, EVENT CODE, SCHEDULE IN / OUT, HRS, CALL IN / OUT, HRS, and STATUS. The table contains several rows of data, including visits for Riley Silver, Ace Space, and Simpson, Ford.

DATE	CLIENT	CLIENT SUPERVISOR	PROGRAM	EMPLOYEE	EMPLOYEE SUPERVISOR	SERVICE	EVENT CODE	SCHEDULE IN / OUT	HRS	CALL IN / OUT	HRS	STATUS
09/02/2024	Silver, Riley		HCPF	Fuda, Joseph		OT	NONE	12:00 PM - 1:00 PM EST	1.00	-	-	Pending
09/03/2024	Ace, Space		HCPF	Fong, Alyssa		HMBAS	NONE	10:57 AM - 12:00 PM EST	1.05	-	-	Confirmed
09/03/2024	Ace, Space		HCPF	Fong, Alyssa		HMBAS	NONE	2:27 PM - 6:07 PM EST	3.67	-	-	Pending
09/04/2024	Ace, Space		HCPF	Fong, Alyssa		HMBAS	NONE	5:21 AM - 3:00 AM EST	21.65	-	-	Pending
09/04/2024	Ace, Space		HCPF	Fong, Alyssa		HMBAS	NONE	1:45 PM - 2:00 PM EST	0.25	-	-	Pending
09/04/2024	Ace, Space	Simpkins, Ford	HCPF	Fong, Alyssa		BHSVC	NONE	-	N/A	- EST	0.53	Hold
09/04/2024	Ace, Space		HCPF	Fong, Alyssa		HMBAS	NONE	-	N/A	- EST	0.32	Confirmed
09/08/2024	Ace, Space		HCPF			HMBAS	NONE	2:40 PM - 2:55 PM EST	0.25	-	-	Pending

Figure 31. Default Filters in Scheduling Module

## Advanced Filters in Scheduling

New search fields have been added to the **Filters** function in **Scheduling** to help users narrow down their search and quickly find the scheduled visit and make changes or cancel.

The screenshot shows a 'Filters' window with the following fields and controls:

- Client:** Text input field with placeholder 'Type 2 letters of the Client's name'.
- Program:** Dropdown menu with 'Select Program'.
- From Date:** Date input field with '12/30/2024' and a calendar icon.
- To Date:** Date input field with '01/10/2025' and a calendar icon.
- From Time:** Time input field with '--:-- --' and a clock icon.
- To Time:** Time input field with '--:-- --' and a clock icon.
- Employee:** Text input field with placeholder 'Type 2 letters of the Employee's name'.
- Schedule Status:** Dropdown menu with 'Select Schedule Status'.
- Exception:** Dropdown menu with 'Select Exception'.
- Supervisor (Employee Or Client):** Dropdown menu with 'Select Supervisor (Employee Or Client)'.
- Primary Payer:** Dropdown menu with 'Select Primary Payer'.
- Position:** Dropdown menu with 'Select Position'.
- Service:** Dropdown menu with 'Select Service'.
- Event Code:** Dropdown menu with 'Select Event Code'.
- Payer Number:** Text input field with placeholder 'Enter Payer Number'.
- Medicaid ID:** Text input field with placeholder 'Enter Medicaid ID'.
- Authorization Number:** Text input field with placeholder 'Enter Authorization Number'.
- EVV Call:** Toggle switch (currently off).
- Schedules with no employee assigned:** Toggle switch (currently off).
- Hide Cancelled Schedules:** Toggle switch (currently on).

At the bottom of the window, there are two buttons: 'CLEAR' and 'APPLY FILTERS'.

Figure 32. Filters Window in Scheduling Module

## Creating Schedules

When selecting **Create Schedule**, users will enter the required information as before. Now, they can select this as a repeat event in the **Repeat Event check box**, choosing a **date range, days**, and **employee** for the recurring events.

The screenshot displays the 'Create Schedule' form with the following sections and fields:

- Client (Program):** Care, Kelly D. | Managed Care Org
- Medicaid ID:** 202005012020
- Client Service Information:**
  - Authorization:** Authorization Number
  - Service:** T1019- Personal Care
  - Event Code:** NONE- Default
  - Authorization Bill Unit Type:** 05- Unit
- Authorizations:** No authorizations found.
- Schedule Event(s):**
  - Event Status:** 01 - Pending
  - Event Date:** 01/22/2025
  - Start Time:** 08:00 AM
  - End Time:** 10:00 PM
- Select Employee:**
  - Position:** Caregiver
  - Working Hour:** Available
  - Match Client Attributes
  - Employee:** Day, Sunny | Caregiver | 478525
  - Repeat Event
  - Comment (Optional):** Type in a comment.
- Buttons:** CANCEL and CREATE PREVIEW

Figure 33. Create Schedule Window

When a user selects the schedule as a **Repeat Event**, the **Repeat Event window** displays, allowing the user to select the **Repeat pattern** and the **Ending instance** by date or after a specific number of events.



Figure 34. Repeat Event Window

Users can now preview the schedule details before saving and adding to the client's schedule. Then, in the **Preview window**, users can select visits to edit using the checkboxes or choose the reschedule option to make changes before saving.

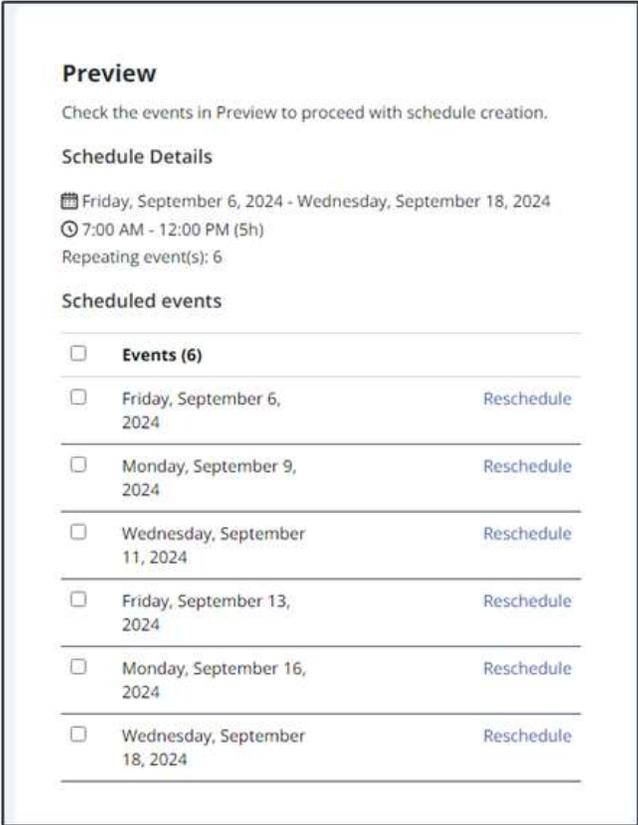
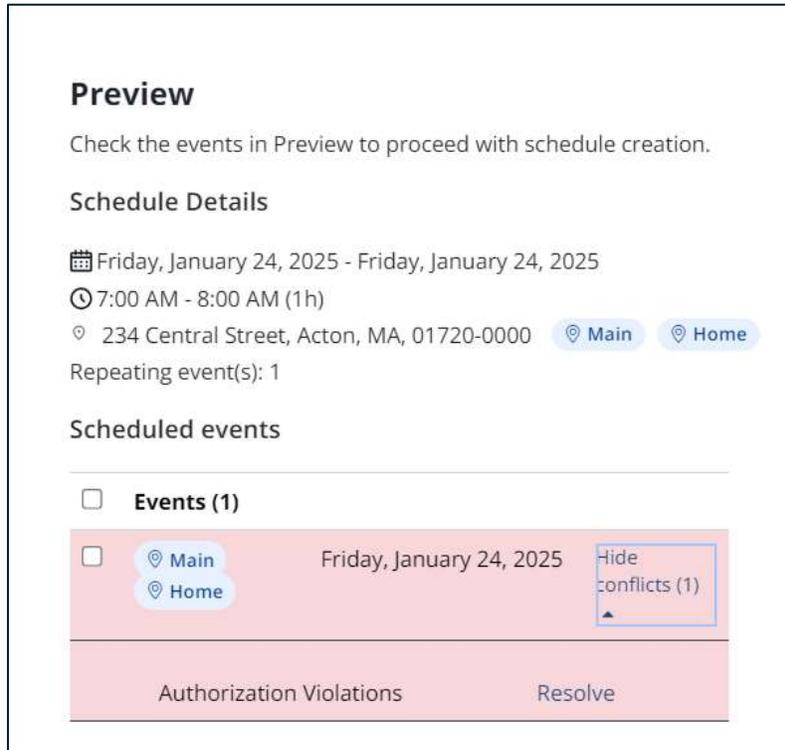


Figure 35. Schedule Preview

If conflicts occur, the **Preview window** will display the conflict and the reason for the conflict so that the user can adjust the schedule by selecting the checkbox and making the needed adjustment.



**Figure 36. Schedule Preview Window with Conflicts**

Once the box is selected to edit, contextual choices will appear, such as **Change Date**, **Change Employee**, or **Override**.

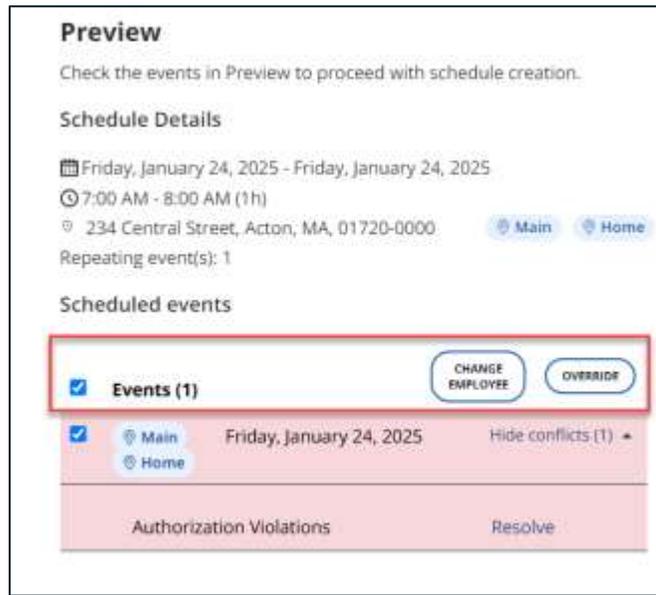
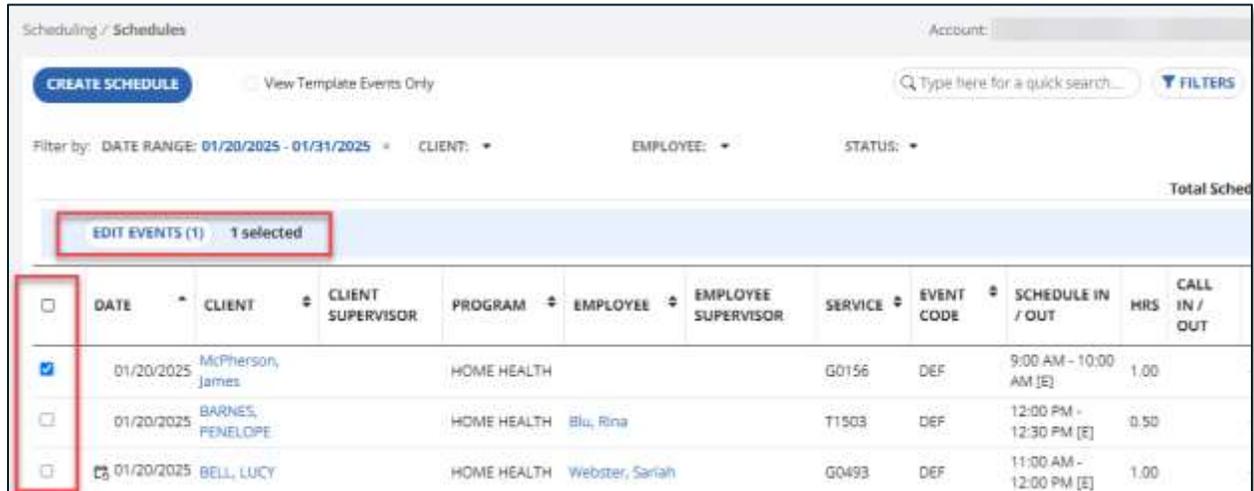


Figure 37. Options Highlighted to Edit

## Batch Editing Schedules

In the **Scheduling Module**, users can edit more than one schedule at a time. They can select a schedule or schedules via the checkboxes in front of the scheduled visit. The **EDIT EVENTS** button will appear. Once **EDIT EVENTS** is selected, the number in the parentheses shows how many events the user chose to edit.

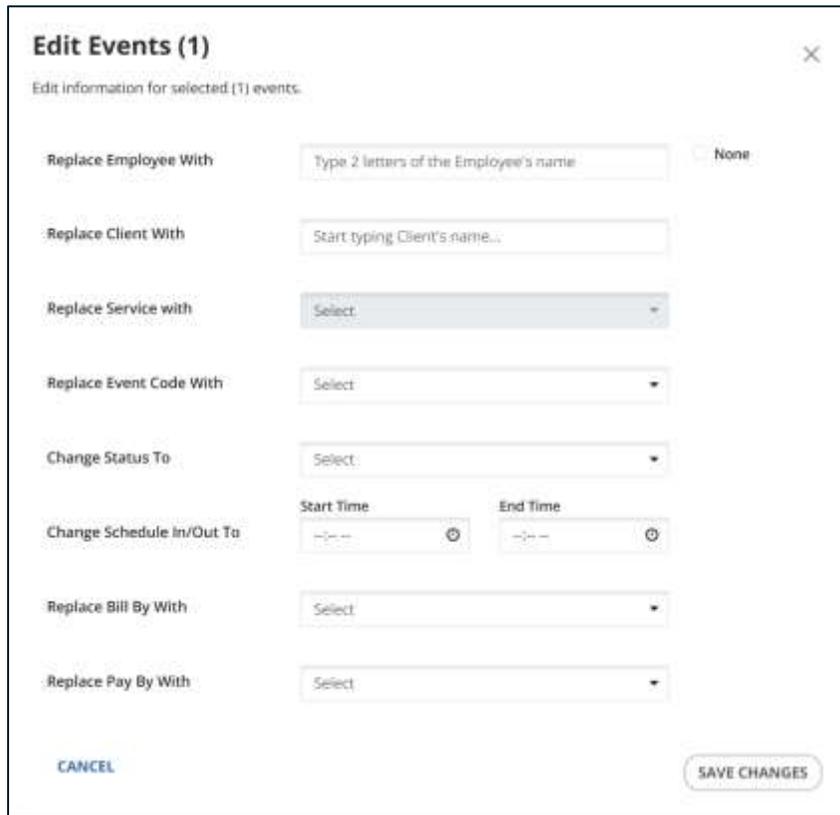


The screenshot shows the 'Scheduling / Schedules' interface. At the top, there is a 'CREATE SCHEDULE' button and a 'View Template Events Only' toggle. A search bar and 'FILTERS' button are also present. Below this, there are filter options for 'DATE RANGE: 01/20/2025 - 01/31/2025', 'CLIENT', 'EMPLOYEE', and 'STATUS'. A 'Total Sched' label is visible on the right. A blue bar indicates 'EDIT EVENTS (1) 1 selected'. Below this is a table with columns: DATE, CLIENT, CLIENT SUPERVISOR, PROGRAM, EMPLOYEE, EMPLOYEE SUPERVISOR, SERVICE, EVENT CODE, SCHEDULE IN / OUT, HRS, and CALL IN / OUT. The first row is selected, and its checkbox is highlighted with a red box.

<input type="checkbox"/>	DATE	CLIENT	CLIENT SUPERVISOR	PROGRAM	EMPLOYEE	EMPLOYEE SUPERVISOR	SERVICE	EVENT CODE	SCHEDULE IN / OUT	HRS	CALL IN / OUT
<input checked="" type="checkbox"/>	01/20/2025	McPherson, James		HOME HEALTH			G0156	DEF	9:00 AM - 10:00 AM [E]	1.00	
<input type="checkbox"/>	01/20/2025	BARNES, FENELOPE		HOME HEALTH	Blu, Rina		T1503	DEF	12:00 PM - 12:30 PM [E]	0.50	
<input type="checkbox"/>	01/20/2025	BELL, LUCY		HOME HEALTH	Webster, Sariah		G0493	DEF	11:00 AM - 12:00 PM [E]	1.00	

**Figure 38. Edit Events Button in Scheduling Module**

In the **Edit Events** window, fields are listed and can be edited, such as **Employee**, **Client**, **Service**, and **Start and End times**.



The screenshot shows a window titled "Edit Events (1)" with a close button (X) in the top right corner. Below the title is the text "Edit information for selected (1) events:". The window contains several form fields:

- Replace Employee With:** A text input field with the placeholder "Type 2 letters of the Employee's name" and a radio button labeled "None" to its right.
- Replace Client With:** A text input field with the placeholder "Start typing Client's name...".
- Replace Service with:** A dropdown menu with "Select" as the current selection.
- Replace Event Code With:** A dropdown menu with "Select" as the current selection.
- Change Status To:** A dropdown menu with "Select" as the current selection.
- Change Schedule In/Out To:** Two date-time pickers labeled "Start Time" and "End Time", each showing "--:--" and a clock icon.
- Replace Bill By With:** A dropdown menu with "Select" as the current selection.
- Replace Pay By With:** A dropdown menu with "Select" as the current selection.

At the bottom left is a "CANCEL" button, and at the bottom right is a "SAVE CHANGES" button.

**Figure 39. Edit Events Window**

Once changes are saved, a notification displays any conflicts caused by the change. In the image below, no conflicts are indicated. Once the user selects **SAVE SCHEDULES**, the visit(s) will update with the new information.

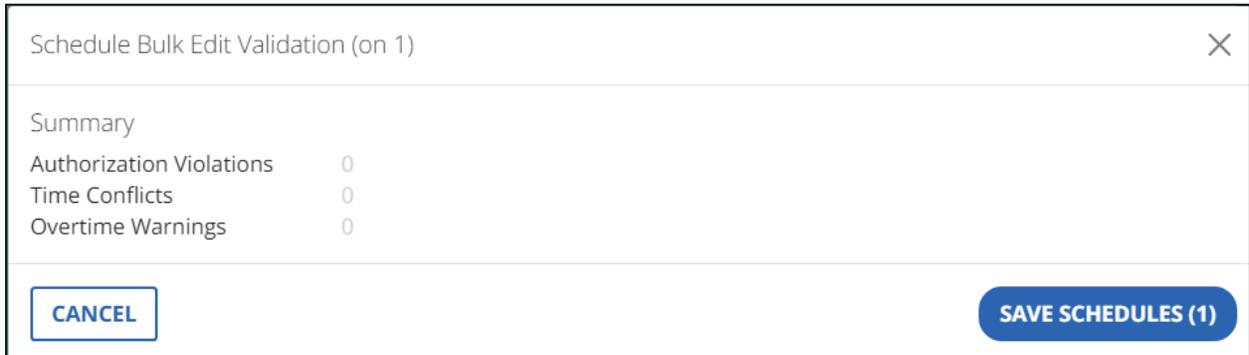


Figure 40. Conflict Screen

## Schedule Templates

Recurring schedules can be set up by using **Schedule Templates** from the **Schedules tab** in the **Client Profile**. This allows users to schedule each day of the week by time and by employee. This is useful when clients need to be set up with a consistent schedule. The **CREATE TEMPLATE** button sits above the list of scheduled visits.



Figure 41. Client Schedule Tab

Users will complete the fields. An employee is not required for a template to be created.

\* Required

**Type**

Service\*  
G0156- HH Aide - Home Health

Event Code\*  
(No modifiers) Default (DEF)

Bill Type\*  
05- Unit

**Schedule**

Day(S) Of The Event\*  
Select day(s) of the event

Start Time\*  
--:--

End Time\*  
--:-- E

**Assignment**

Employee  
Start typing employee's name...

Comments  
Write your comments here...

Active Schedule population  
If checked, your template will generate schedule for two weeks in future

CANCEL ADD EVENT

Figure 42. Create Template Window

Once **ADD EVENT** is selected, the user enters the end date in the pop-up window and select **GENERATE**.



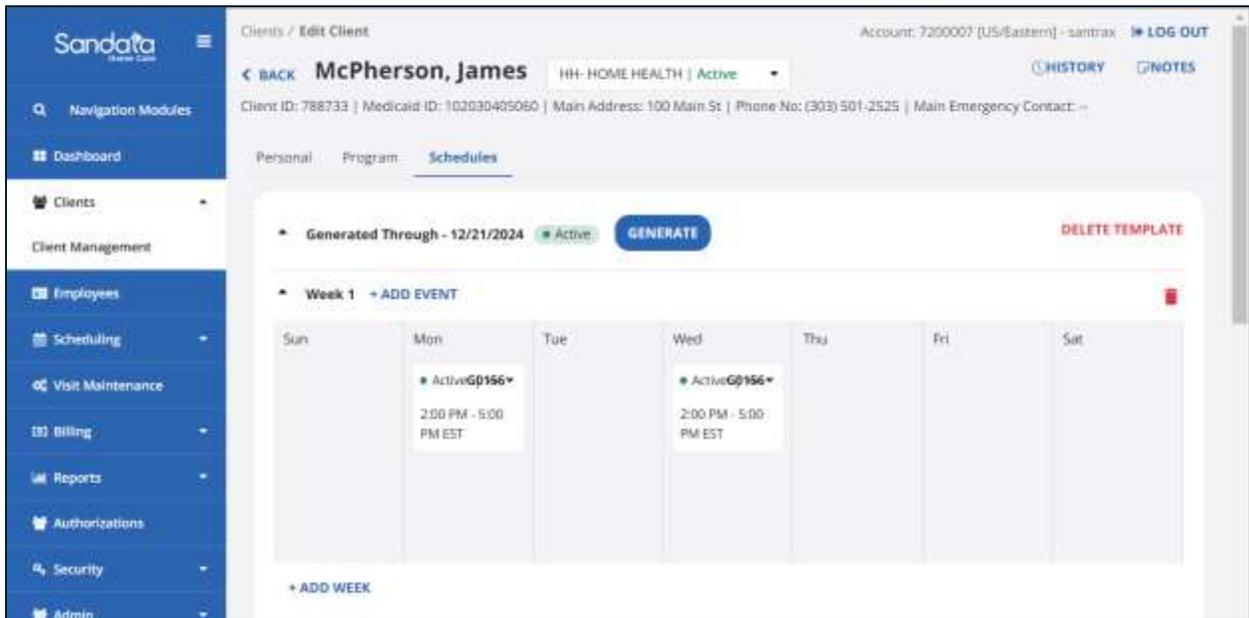
Generate Schedule(s)

End Date\* 03/01/2025

CANCEL GENERATE

Figure 43. Schedule Template End Date Window

The **Schedule template** appears in the **Client Schedules tab**. Additionally, the scheduled visits will appear for this client in the **Scheduling module**.



Sandata

Clients / Edit Client Account: 7200007 [US/Eastern] - santrax LOG OUT

BACK McPherson, James HH- HOME HEALTH | Active HISTORY NOTES

Client ID: 788733 | Medicaid ID: 102030405060 | Main Address: 100 Main St | Phone No: (303) 501-2525 | Main Emergency Contact: --

Personal Program Schedules

Generated Through - 12/21/2024 Active GENERATE DELETE TEMPLATE

Week 1 ADD EVENT

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	Active GP156 2:00 PM - 5:00 PM EST		Active GP156 2:00 PM - 5:00 PM EST			

+ ADD WEEK

Figure 44. Generated Schedule Template View

# Reports

The **Reports module** has been updated so that report names display when users navigate to the **Reports module**. Searching for a specific report first is no longer necessary. Users first select the name of the report to run, then use the related set of filters to specify parameters for the report. Reports can also be scheduled in this manner. Reports listed are program-specific.

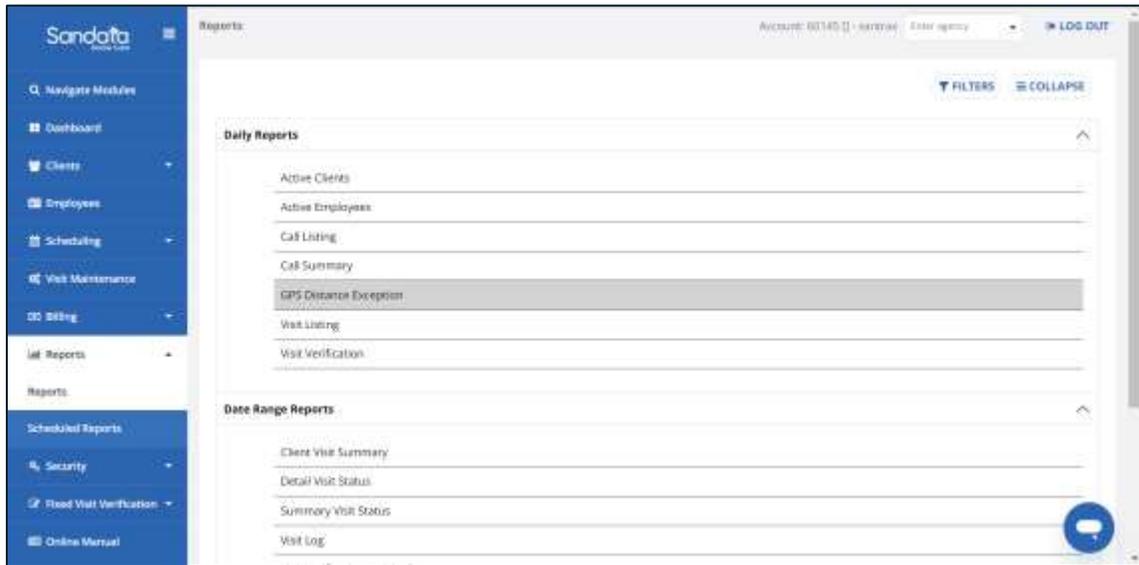
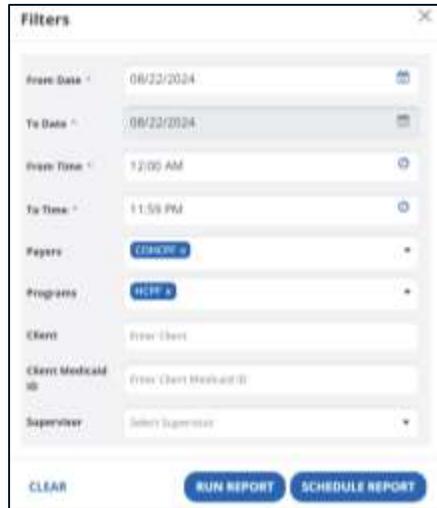


Figure 45. Reports Module List of Reports by Type and in Alphabetical Order



**Figure 46. Example of Filters in Reports**

## Collapsed View in the Reports Module

For a quick glance at the types of reports available, users now have the option to **COLLAPSE** the report view. The arrow on the right will expand to display the individual report names.



**Figure 47. Reports Module in Collapsed View**

# Security Module

In the **Security module**, there are two UI updates. In **Manage Users**, system administrators will see the list of users automatically load, and can select a user for editing permissions and resetting a password.

Additionally, the **CREATE USER** button now appears in the top left of the screen.

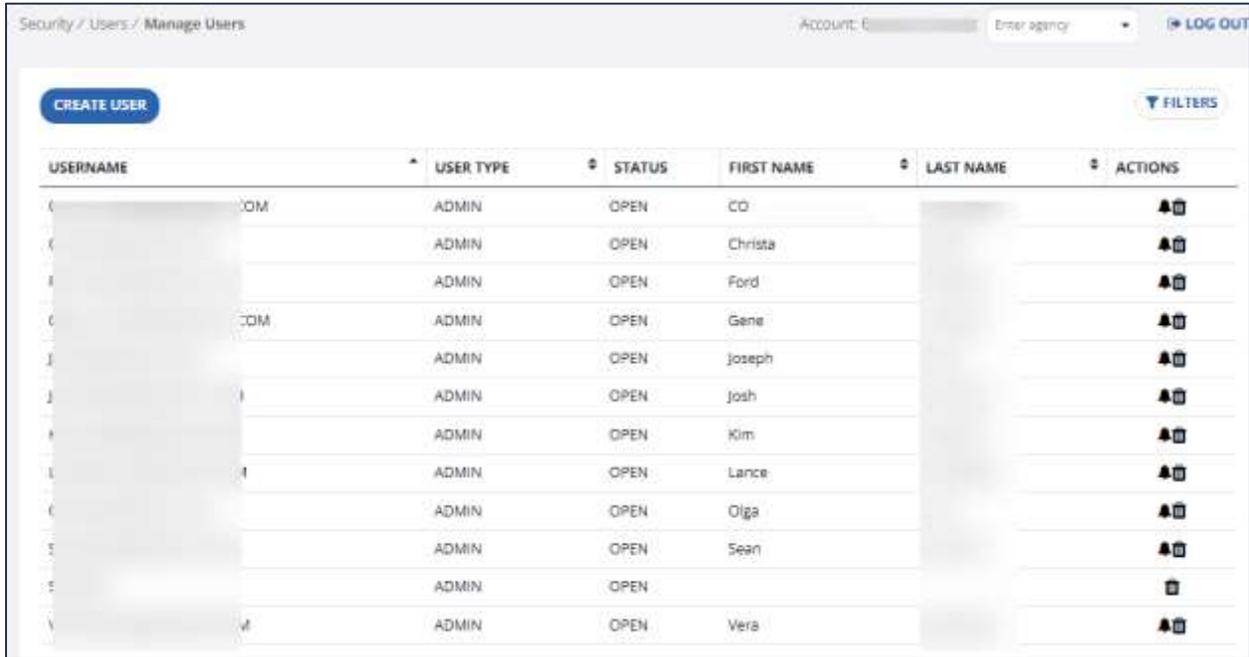


Figure 48. Manage Users View in Security Module