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

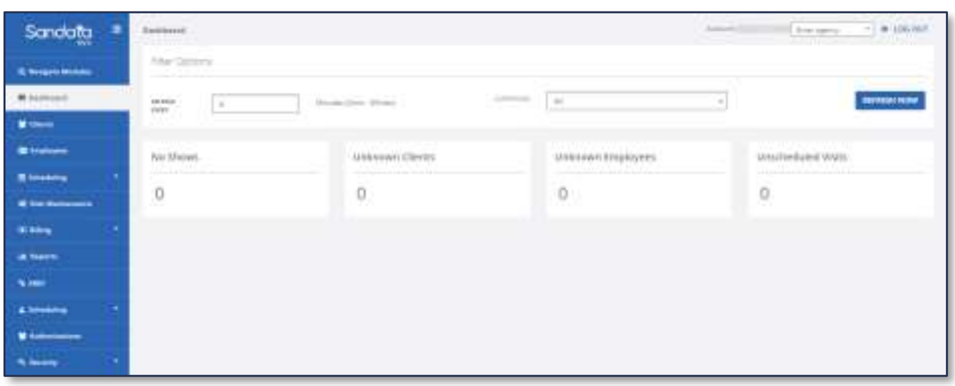

Figure 2. Former Dashboard

The landing page **dashboard** has a new look, with snapshots of visit exceptions and visis 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.

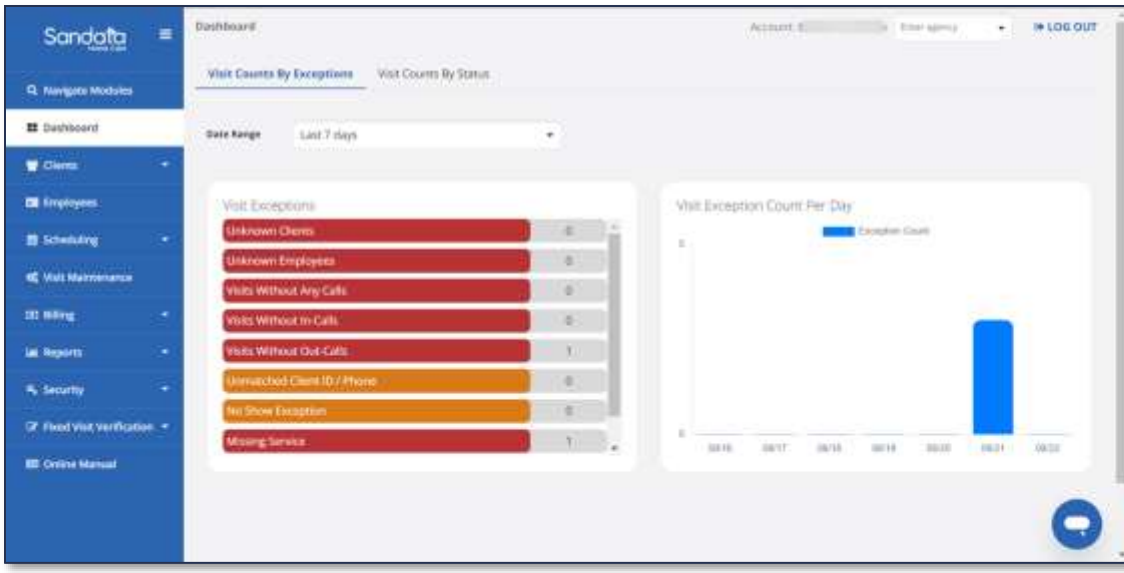

Figure 3. New Dashboard/Landing Page

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.

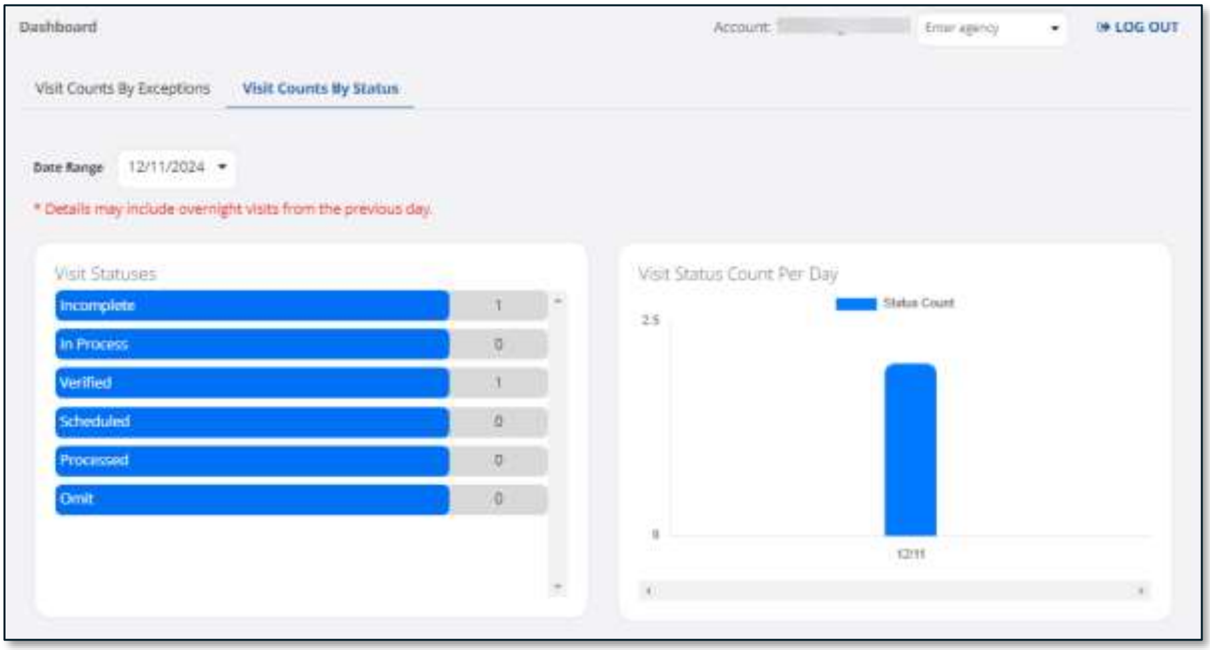

Figure 4. Visit Counts by Status Dashboard

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**.

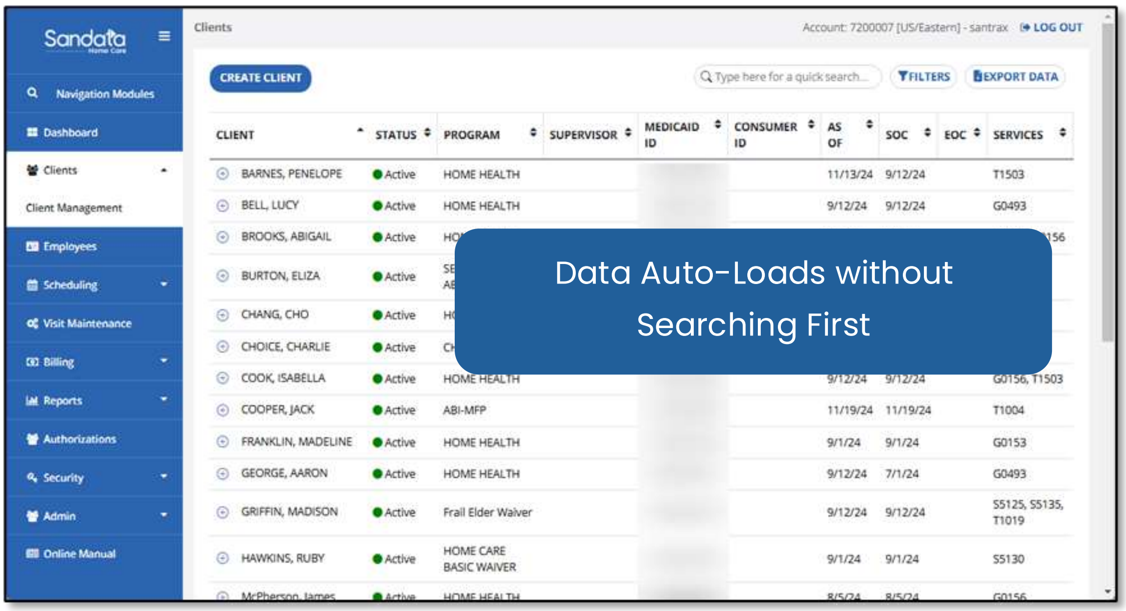

Figure 5. Client Management Screen

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.

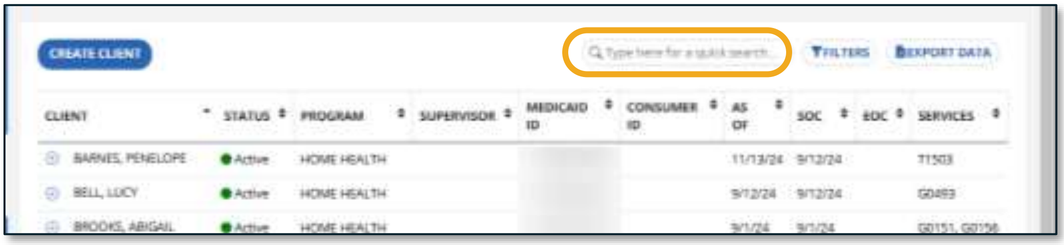

Figure 6. Quick Search Field

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**.

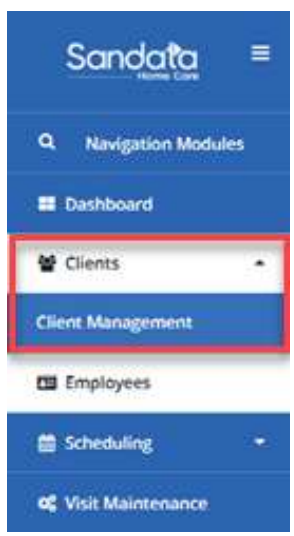

Figure 9. Client Management Menu Option

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.

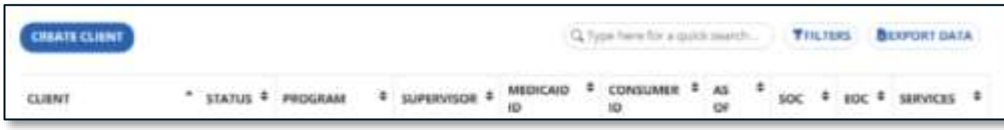

Figure 10. Quick Search Field

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.

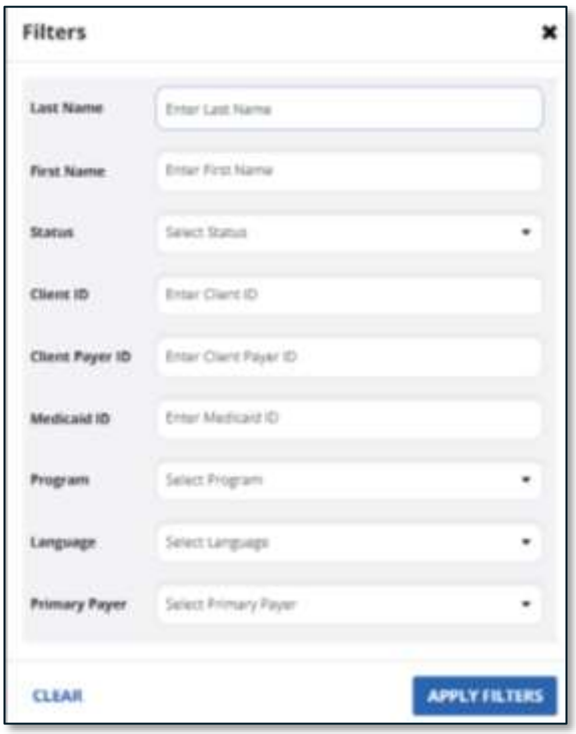

Figure 11. Filter Options

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.

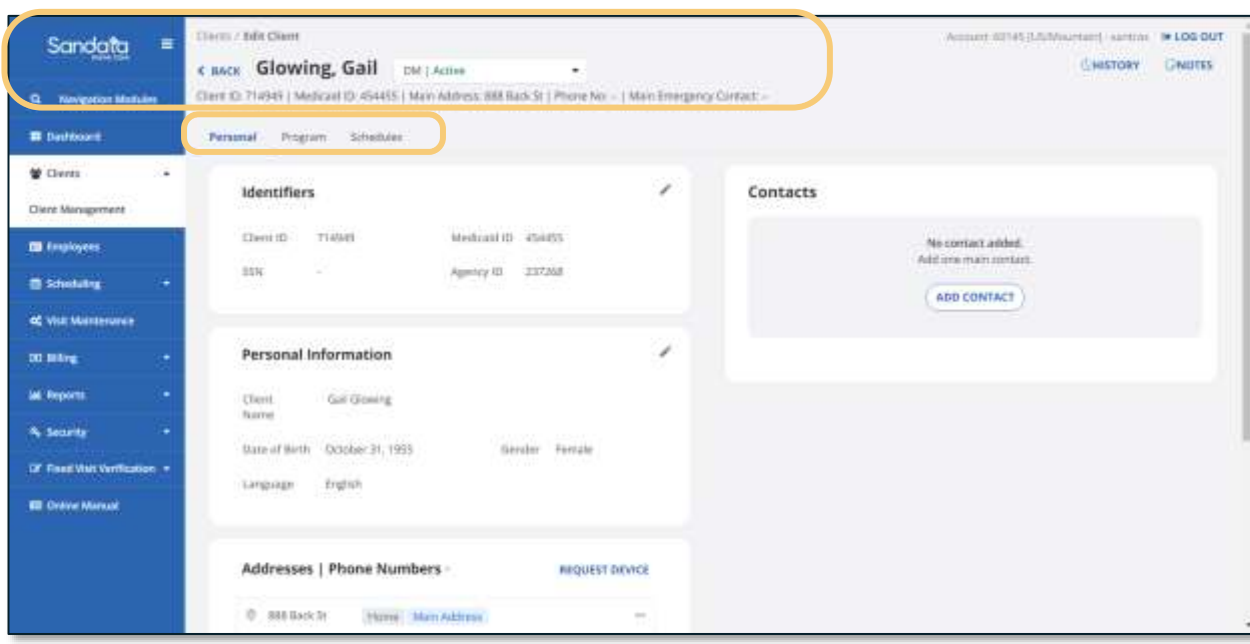

Figure 13. Edit Client Screen with Name and Essential Details at the Top

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.

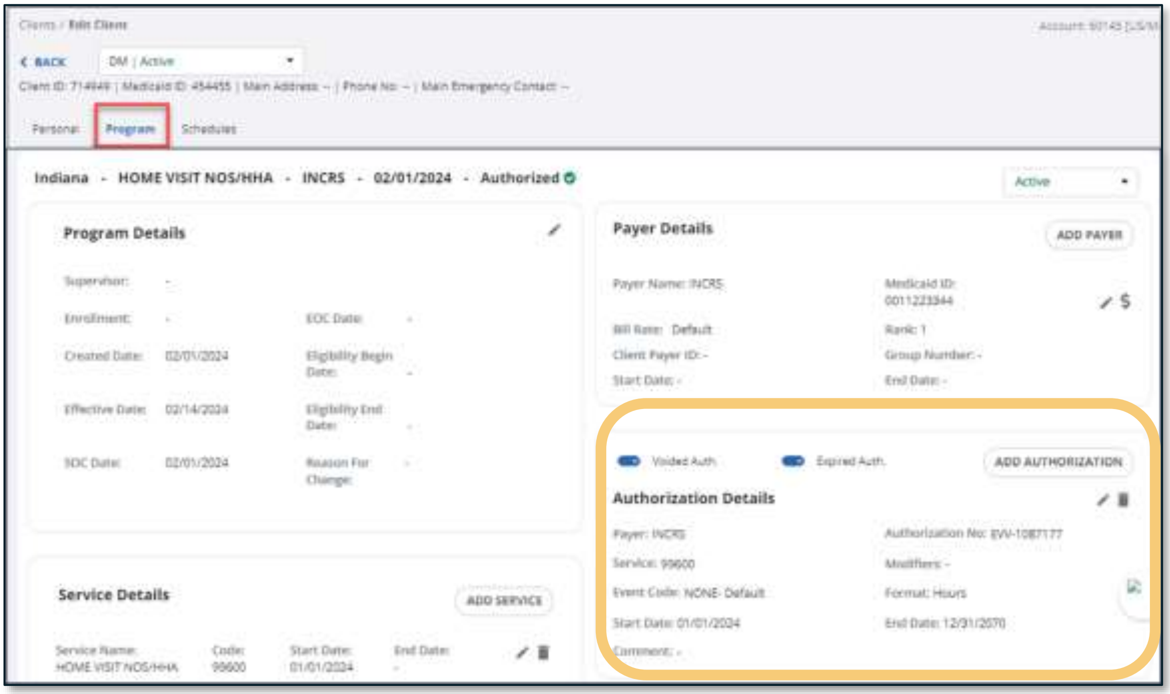

Figure 14. Authorization Details in Client Program Tab

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.

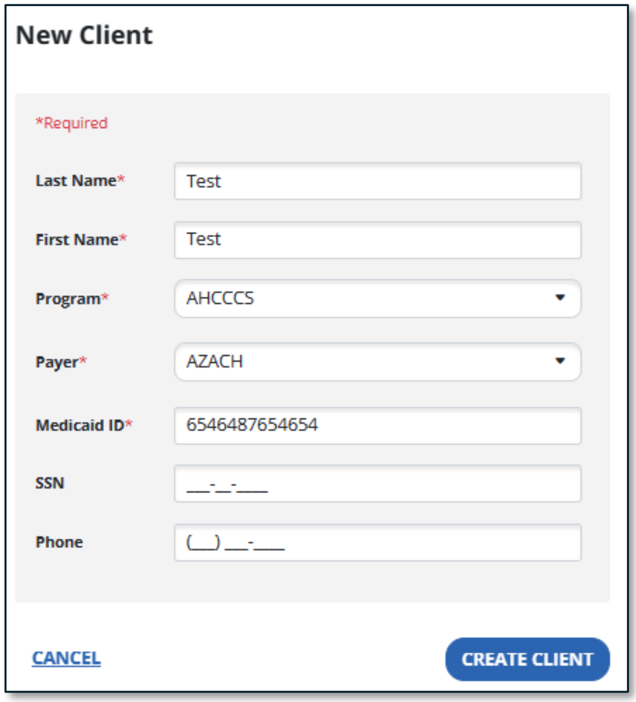

Figure 15. New Client Form

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.

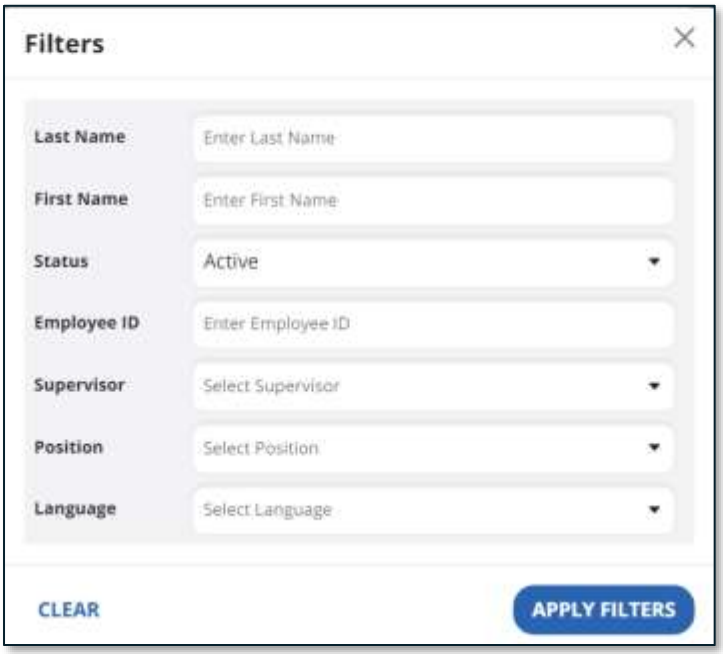

Figure 17. Employee Filters Window

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**.

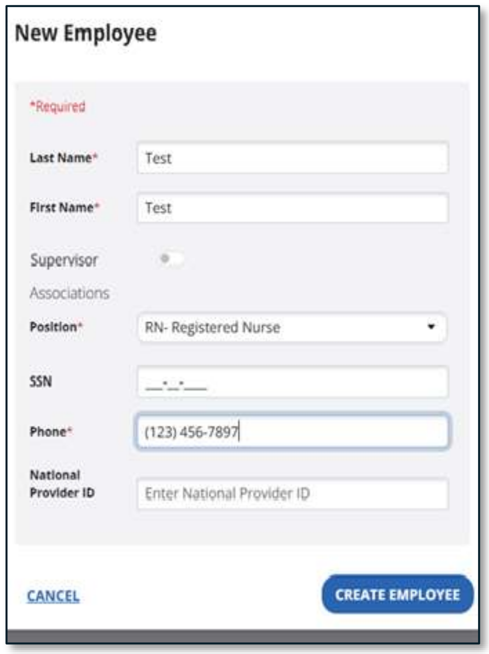

Figure 18. Create Employee Screen

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.

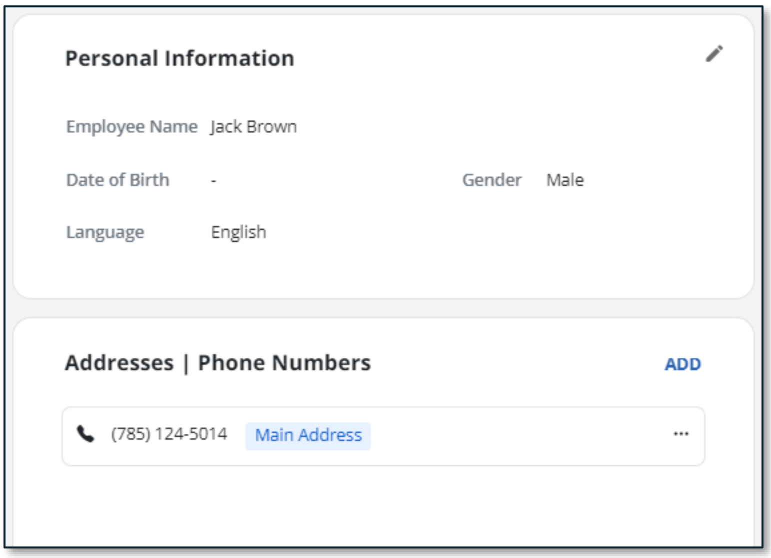

Figure 19. Address and Phone Numbers Window

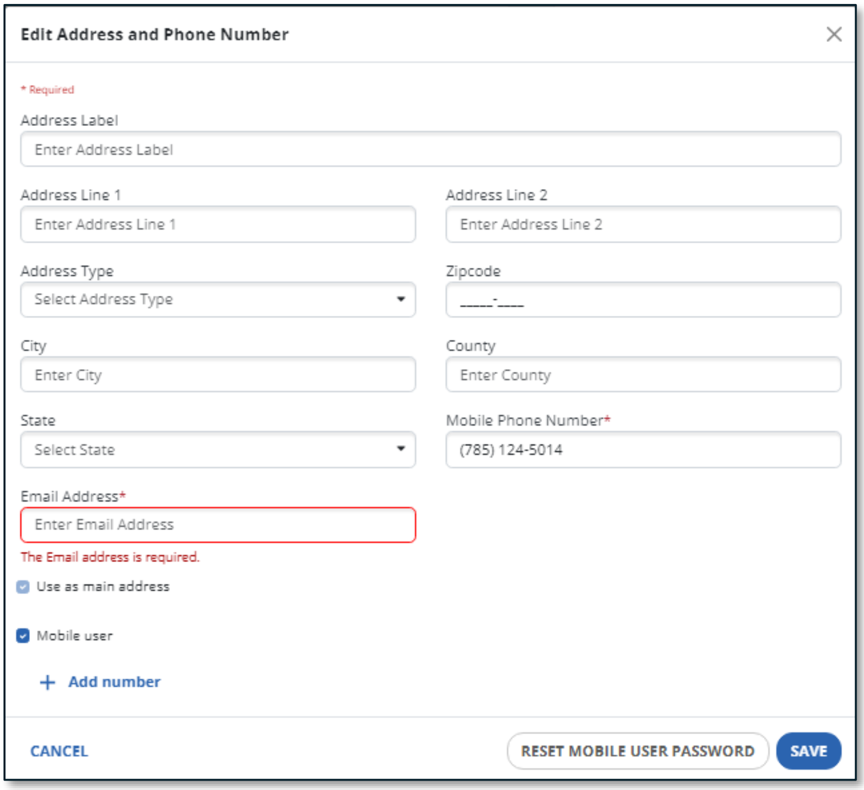

Figure 20. Email Address Required Field

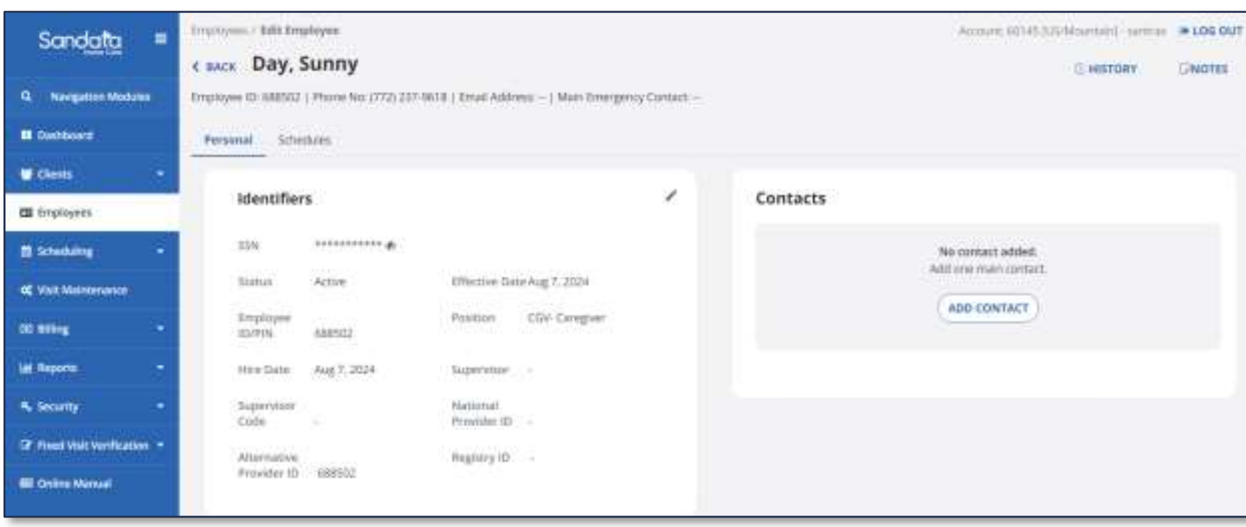

Figure 21. New Employee View with Personal Identifiers and Contacts

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.

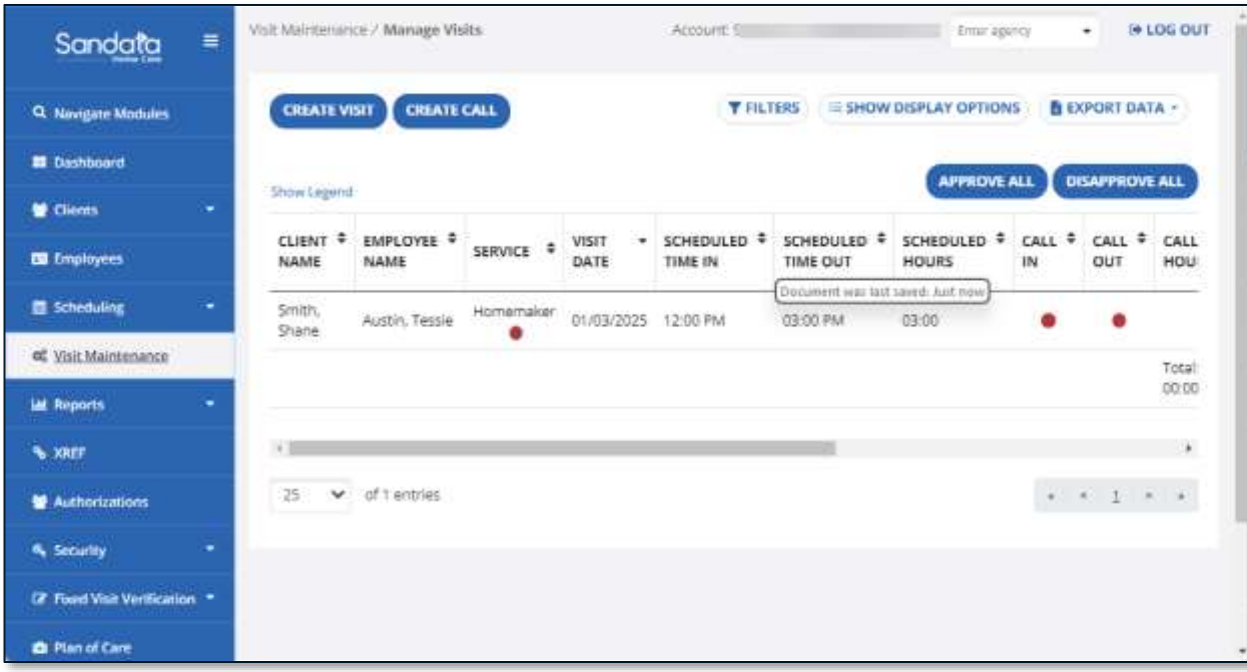

Figure 22. Visit Maintenance Module View

Easy-to-use Visit Search

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

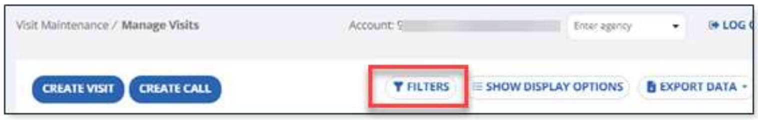

Figure 23. Filter Button in Visit Management

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.

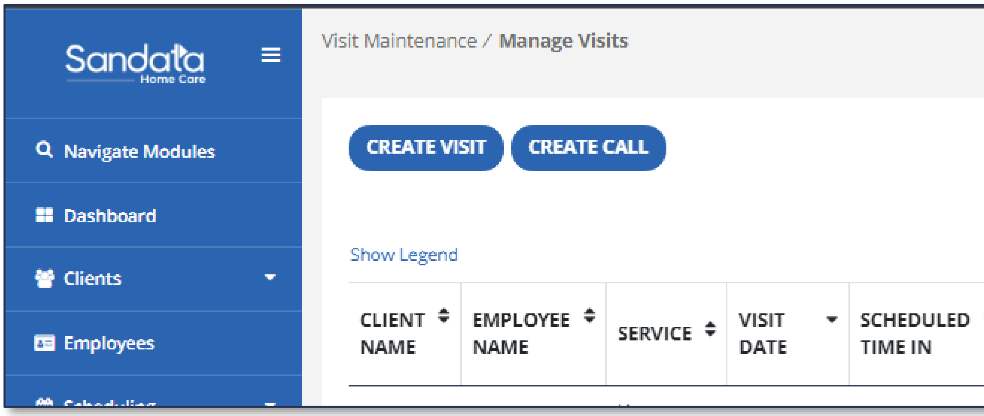

Figure 25. Create Visit and Create Call Buttons

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

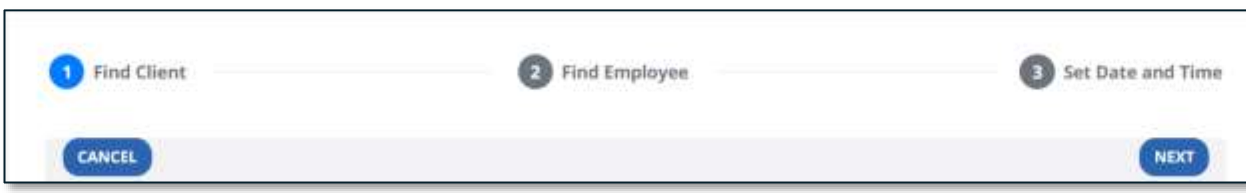

Figure 26. Visit Information Progress View

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.

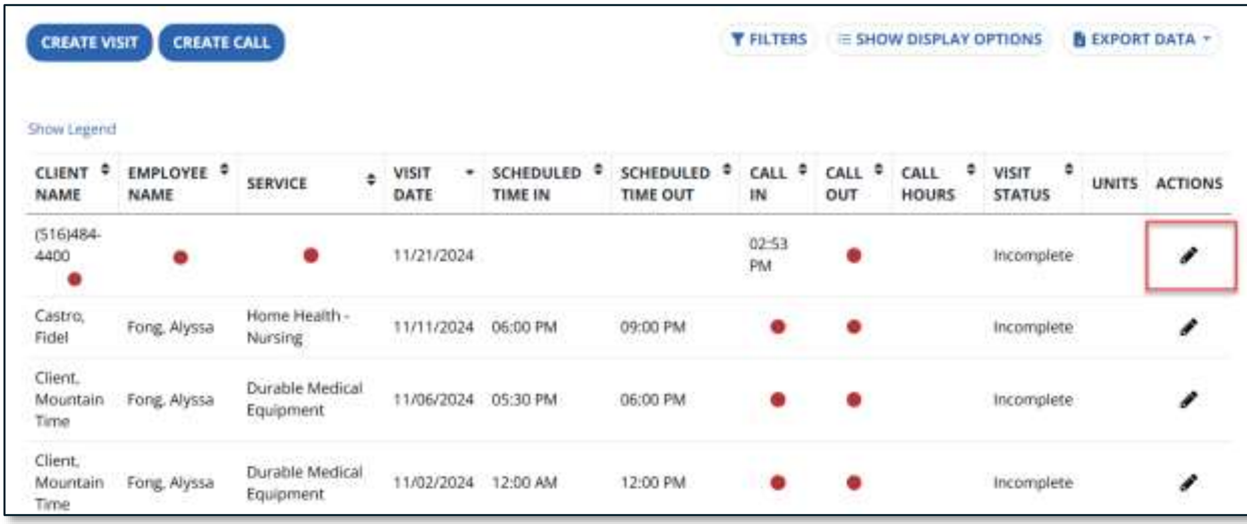

Figure 27. Edit Visit in Visit Grid

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**.

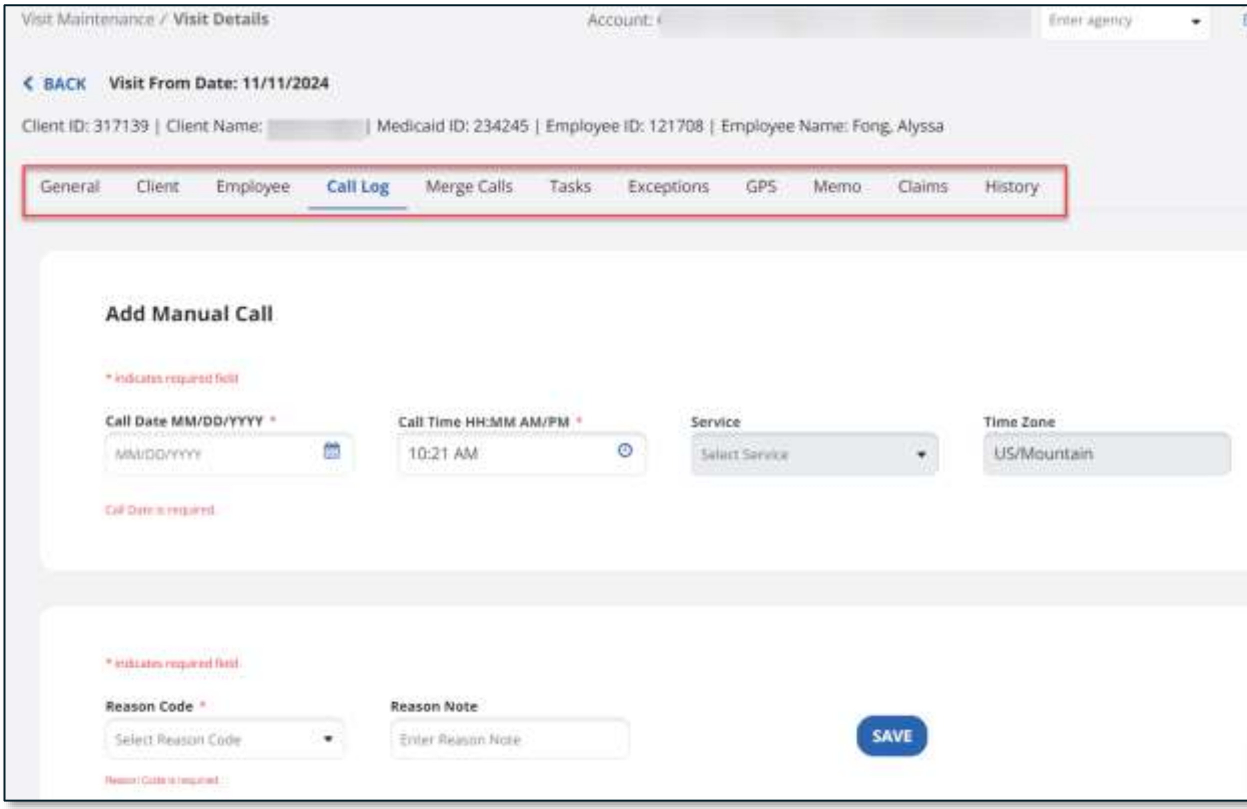

Figure 28. Visit Details Screen with Tabs Across Full Screen for Resolving Exceptions

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.

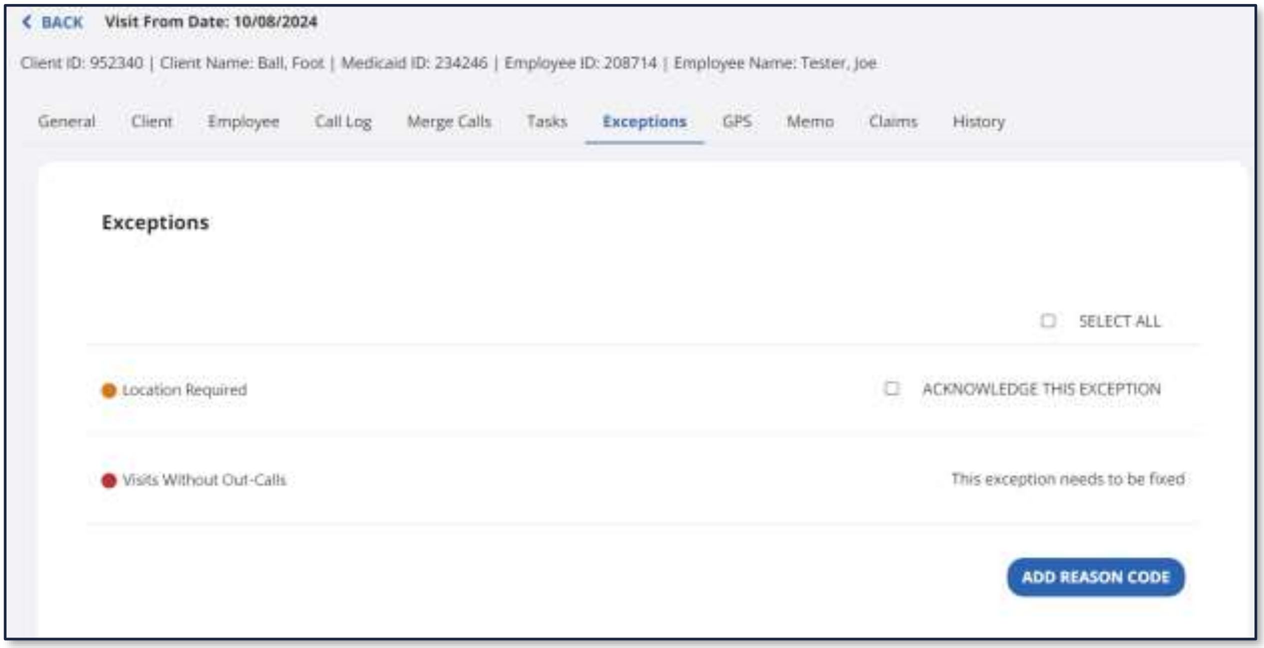

Figure 29. Exceptions Tab in Visit Details Screen

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.

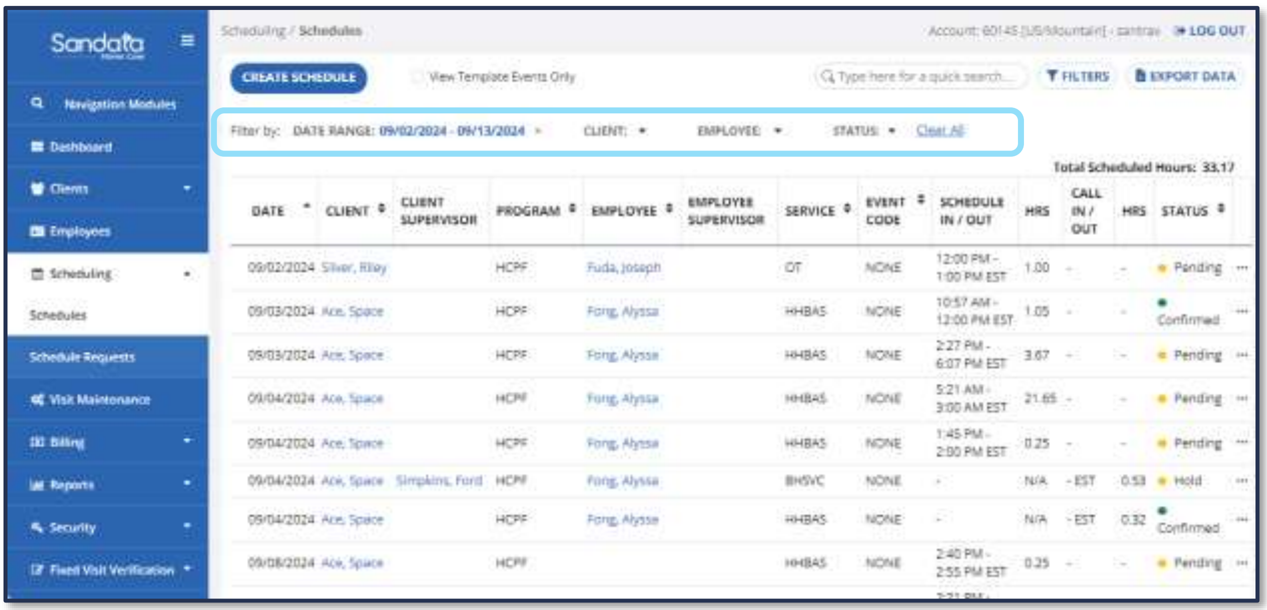

Figure 31. Default Filters in Scheduling Module

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.

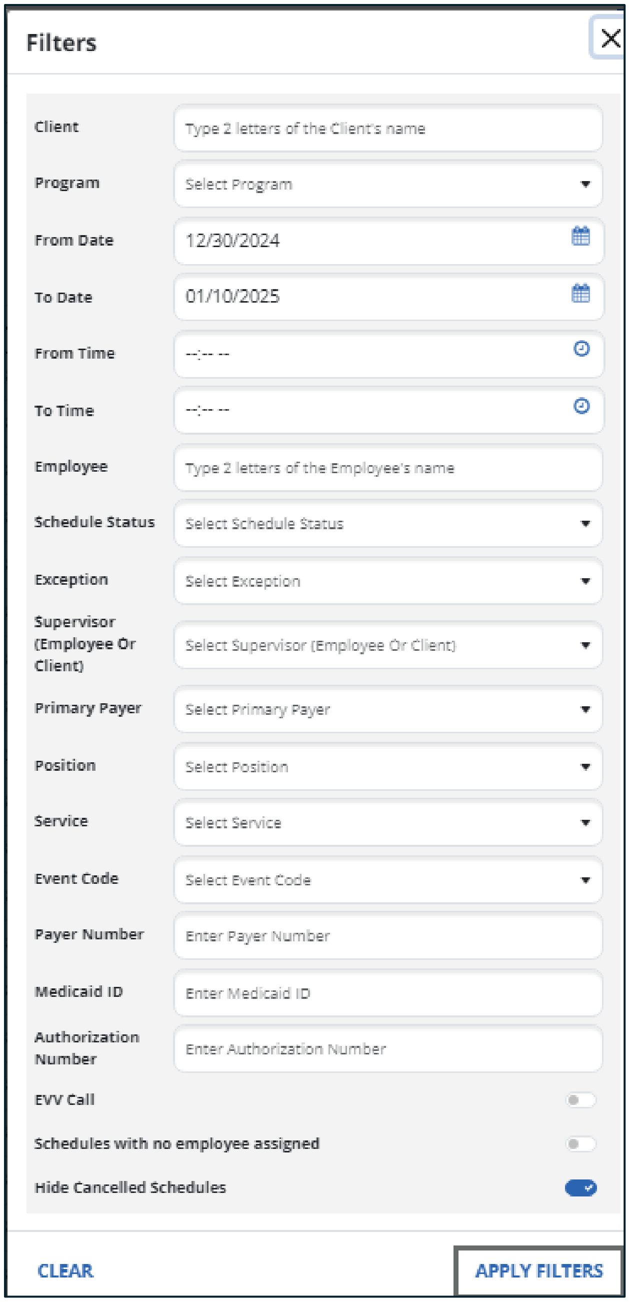

Figure 32. Filters Window in Scheduling Module

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.

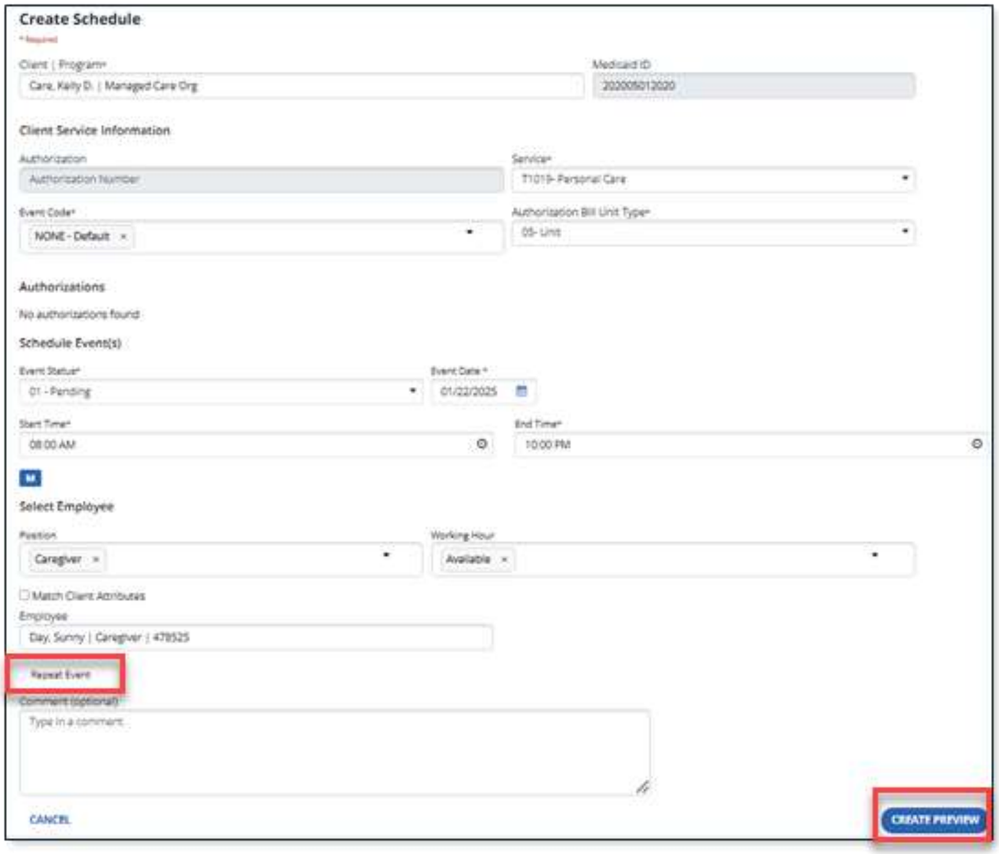

Figure 33. Create Schedule Window

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.

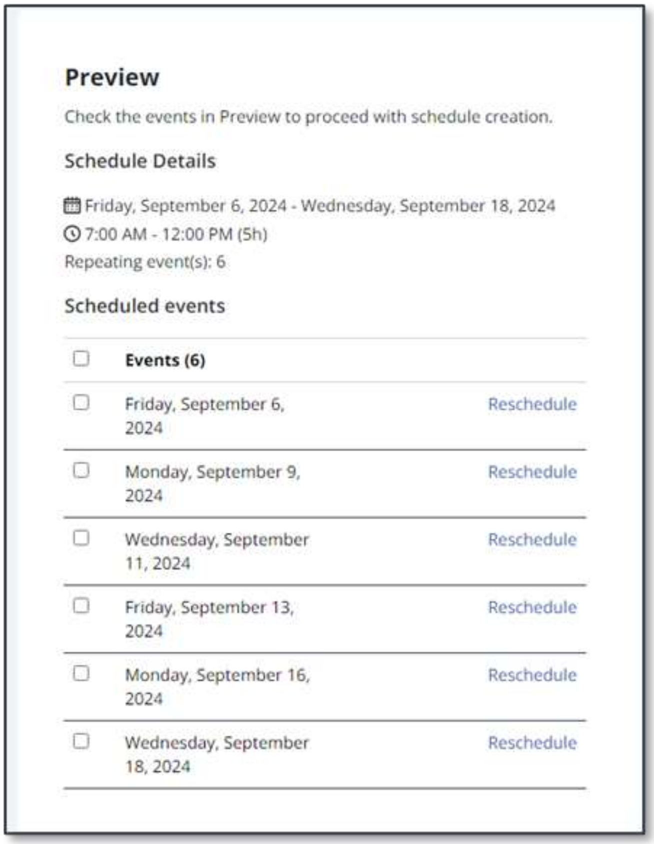

Figure 35. Schedule Preview

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.

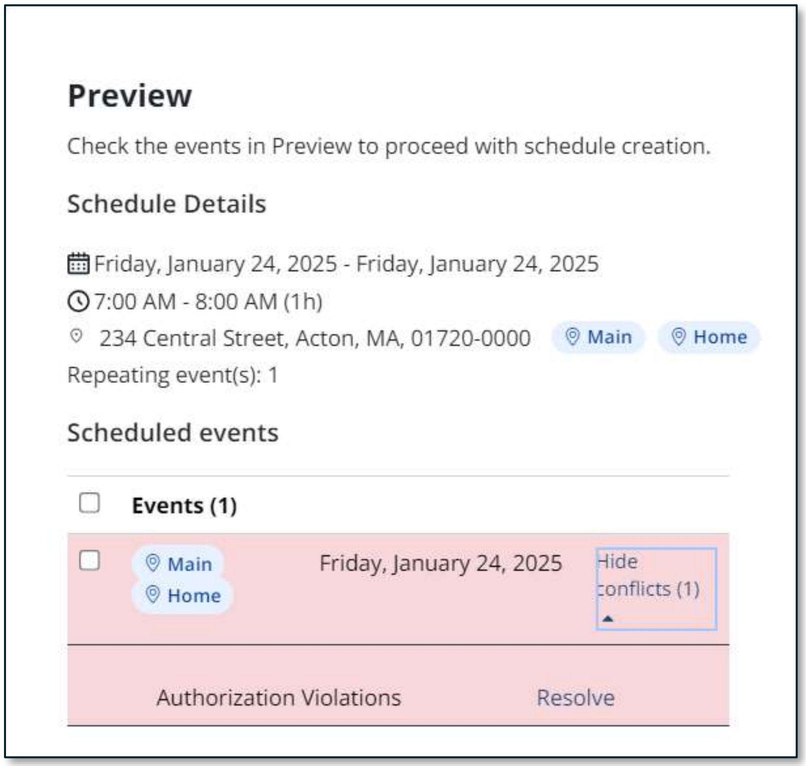

Figure 36. Schedule Preview Window with Conflicts

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

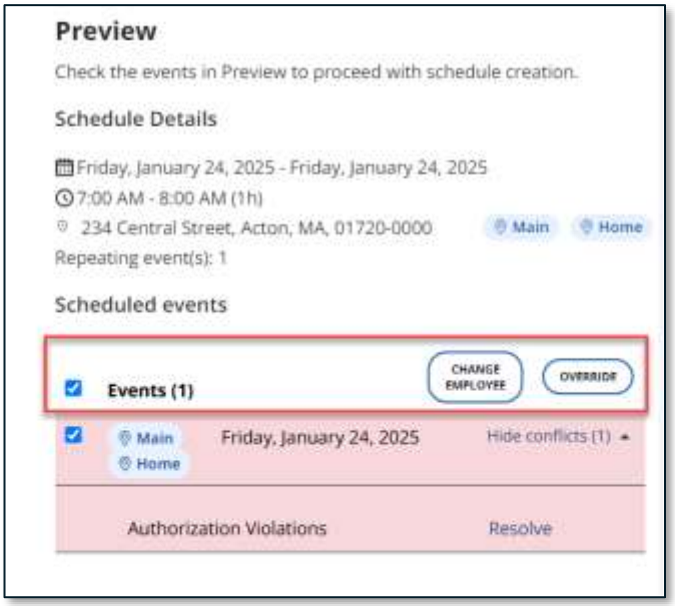

Figure 37. Options Highlighted to Edit

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.

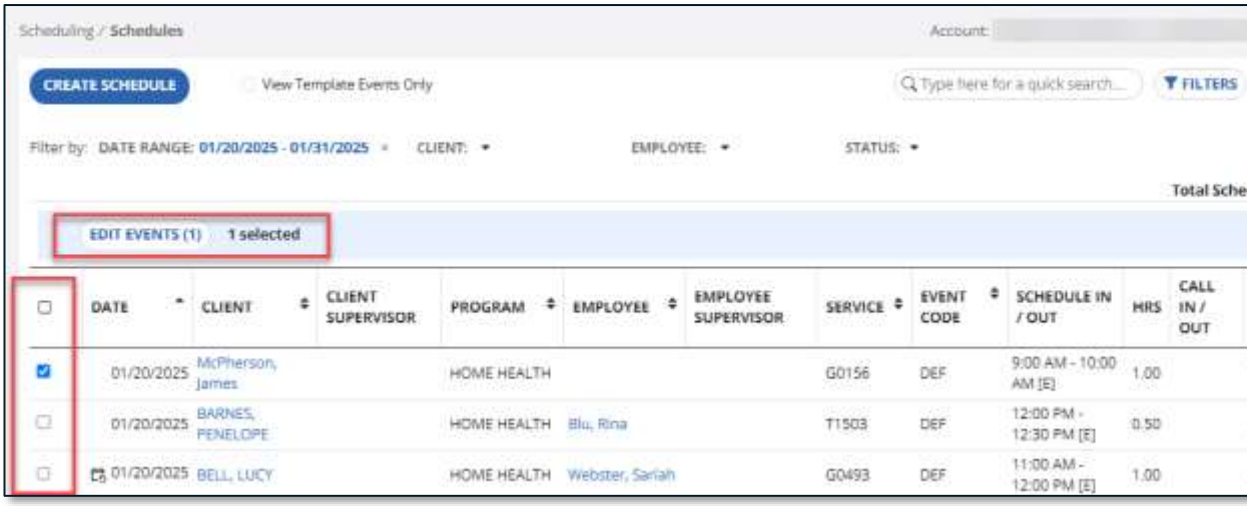

Figure 38. Edit Events Button in Scheduling Module

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

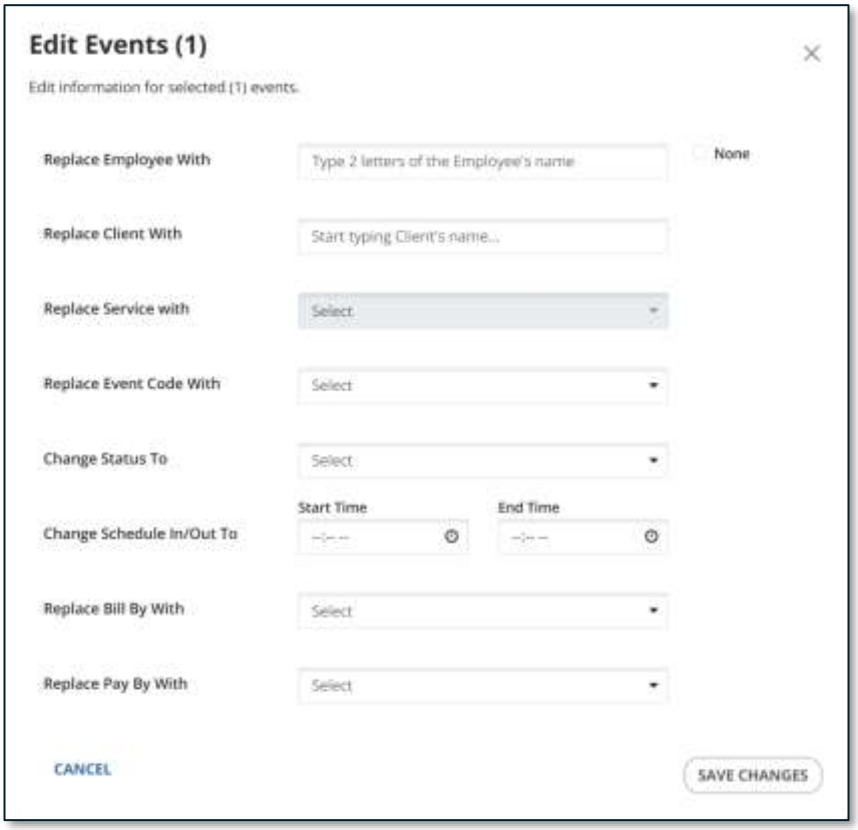

Figure 39. Edit Events Window

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.

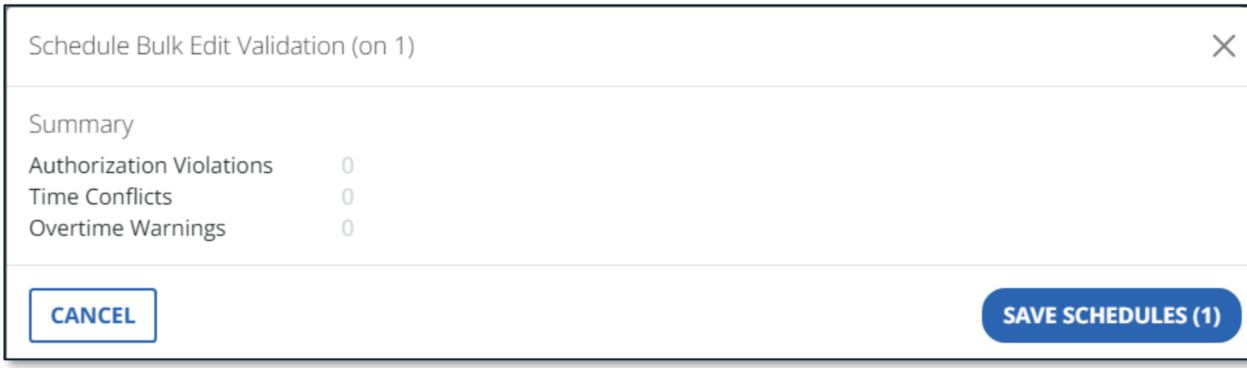

Figure 40. Conflict Screen

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.

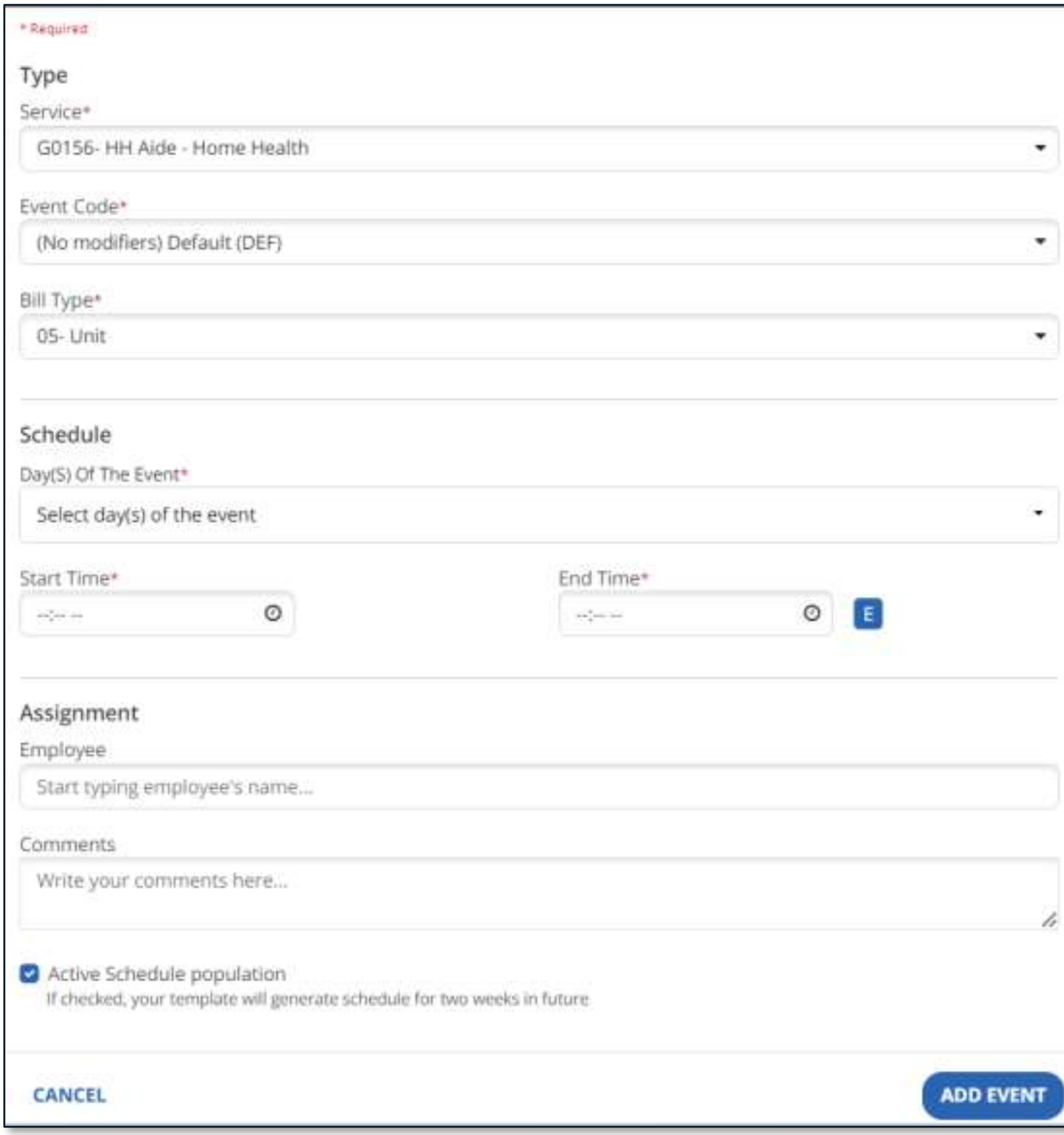

Figure 42. Create Template Window

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

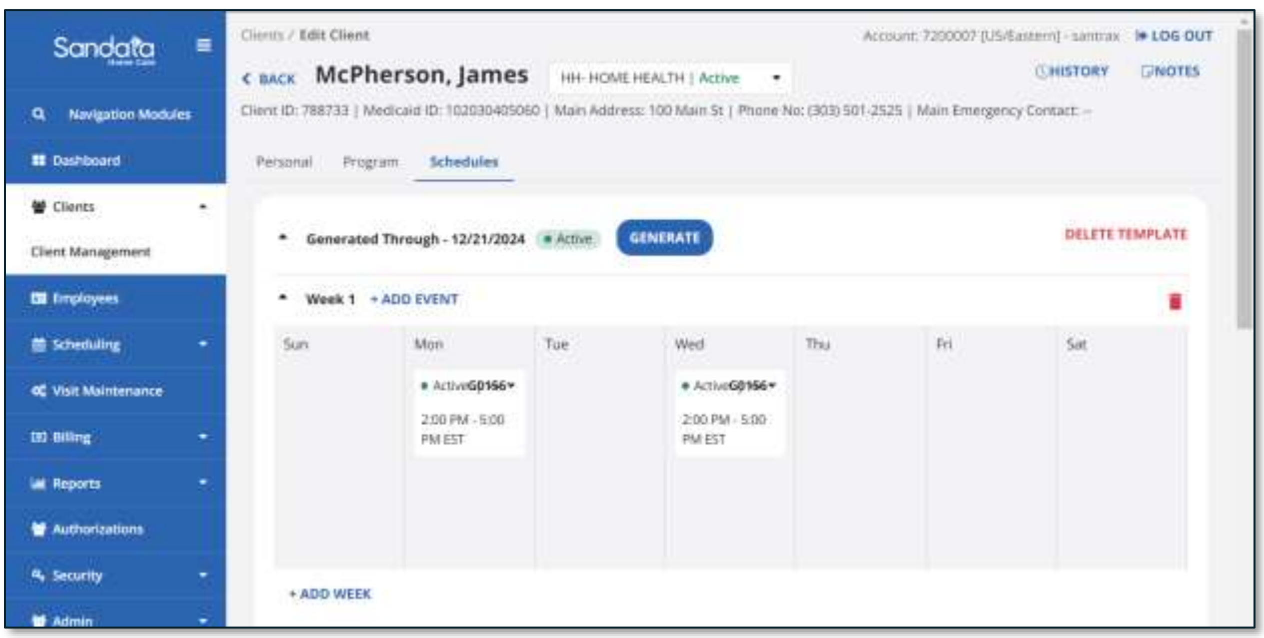

Figure 44. Generated Schedule Template View

Reports

The **Reports module** has neen 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

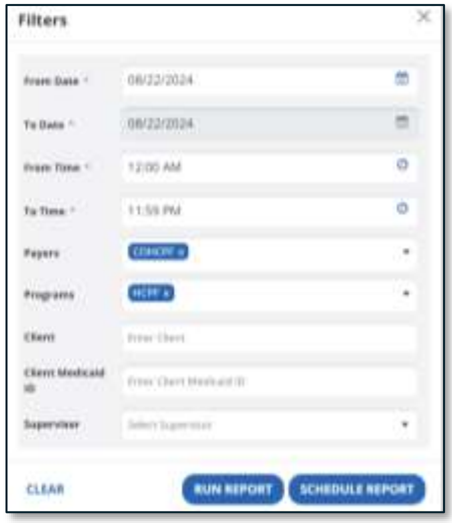

Figure 46. Example of Filters in Reports

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.

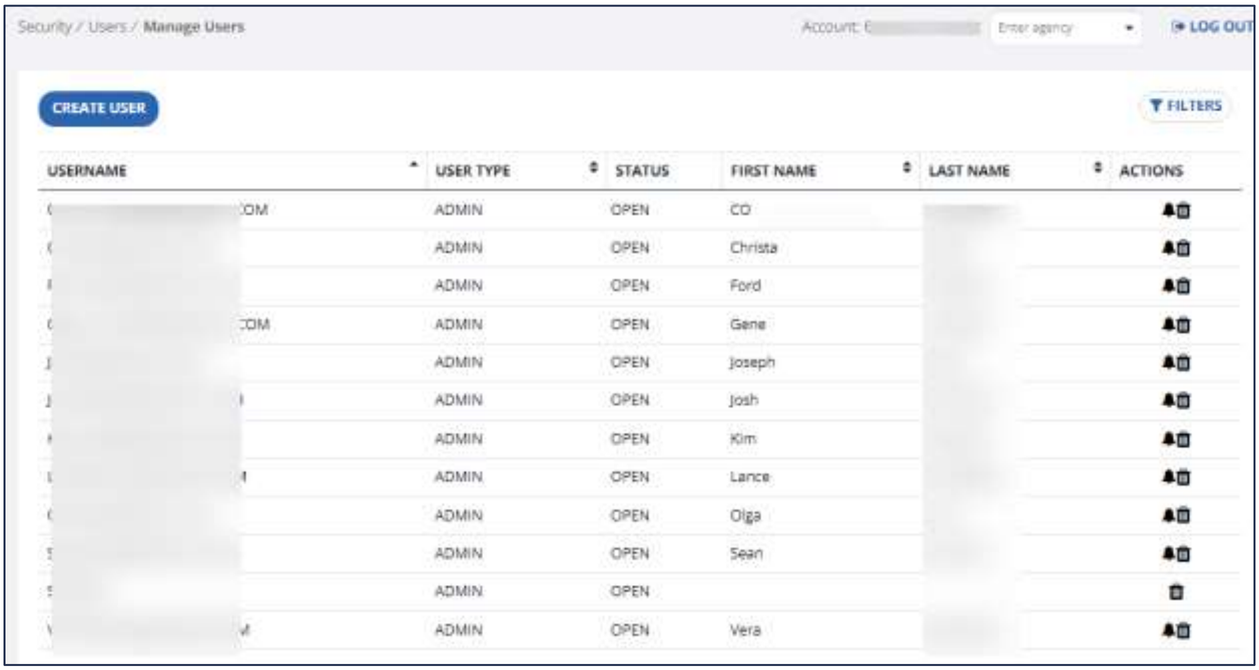

Figure 48. Manage Users View in Security Module