

# Our Webinar Will Begin Shortly

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My speaking language: English ›

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Q&A



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# Mastering Data Entry

March 2025

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## Data Entry



This training covers the Recipient and DCW/Employee modules, focusing on how to manage records and information for both.

### **Who should take this training?**

Those whose role it is to enter data information regarding your Recipients and DCW/Employees records.

Alt EVV providers, will manage recipient and DCW/Employee records in their Alt EVV system which is then sent to Sandata EVV. For additional support on entering these records, please contact your Alt EVV vendor.

## Objectives of Today's Training

**You will be able to:**

- Manage Recipient profiles.
- Locate and enable EVV settings in Sandata EVV.
- **Filter and export data for recipient and DCW/Employee reporting.**
- **Manage DCW/Employee profiles.**



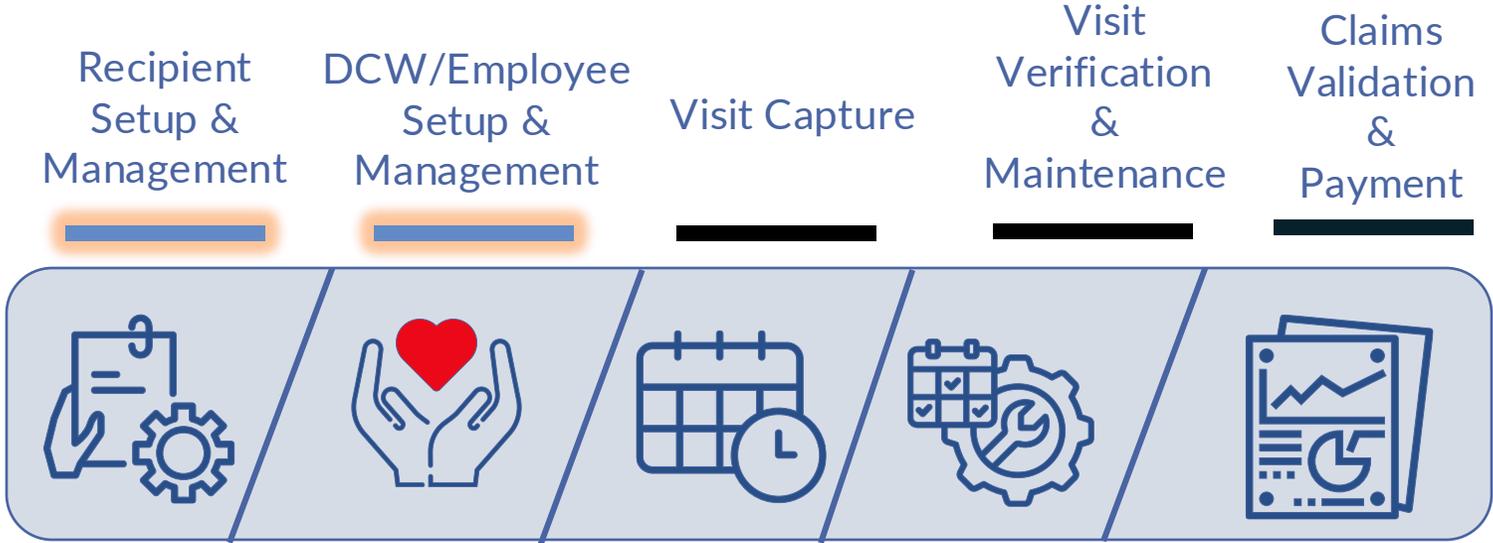


# Agenda

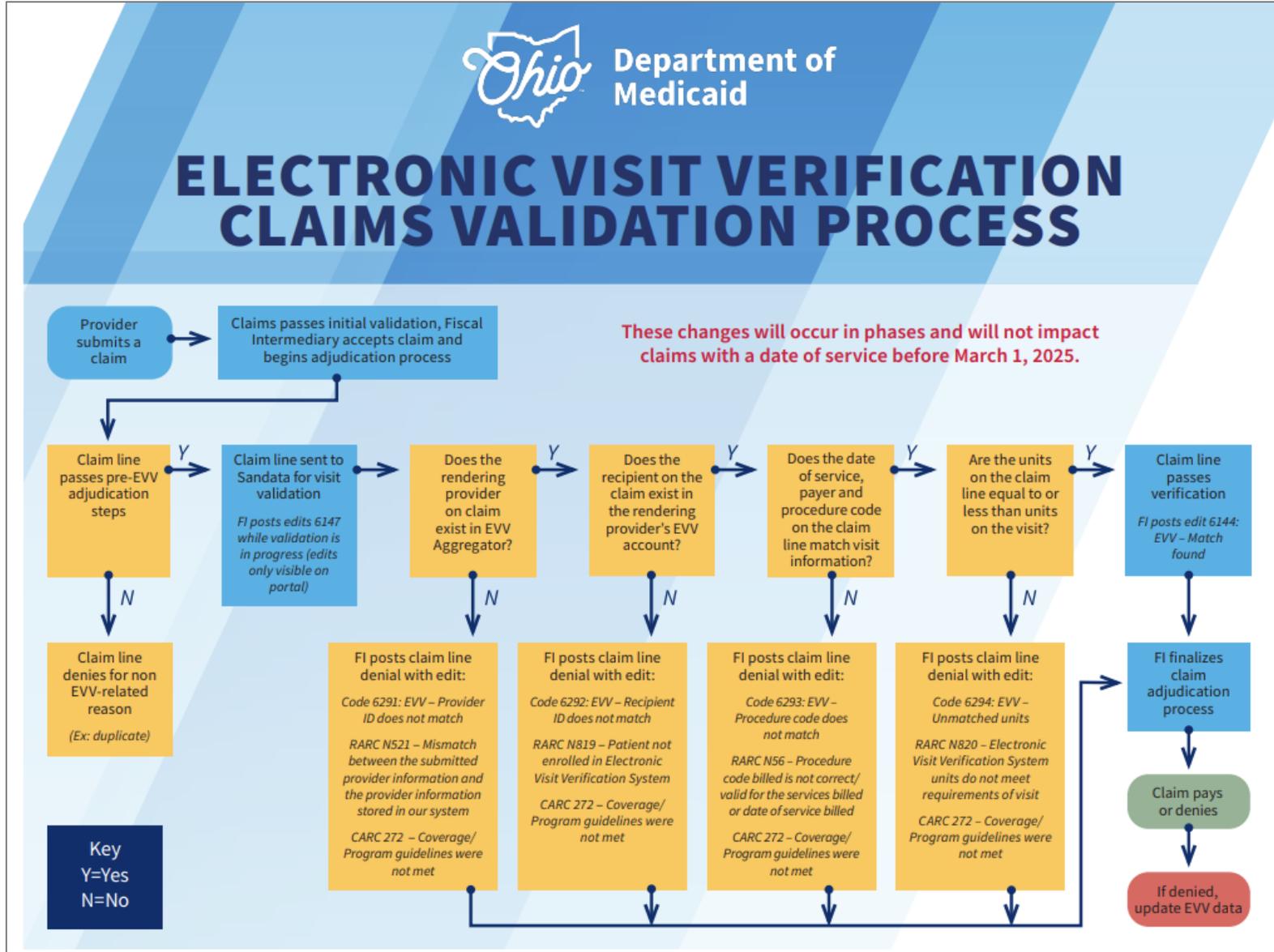
- EVV Overview
- Setting Up Recipient Profiles
- Creating DCW/Employee Profiles
- EVV Checkpoints
- Exporting Data
- Key Takeaways
- Support Resources
- Q & A



# EVV Tracker



# Electronic Visit Verification Claims Validation Process



# EVV Overview

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# Electronic Visit Verification Overview



Under the 21st Century Cures Act, providers must use Electronic Visit Verification (EVV) for Medicaid-paid personal care and home health services.

DCW/Employees need to record their visits electronically to confirm services are done correctly.

The first part of this training will help you enter data for your recipient and DCW/Employee accurately. This ensures visits are tracked, improves accountability, reduces errors, and helps your agency follow the rules.

# Visit Capture



DCW/Independent Provider captures the visit using Sandata Mobile Connect (SMC) app, Telephonic Visit Verification (TVV), or provider manually creates visit.

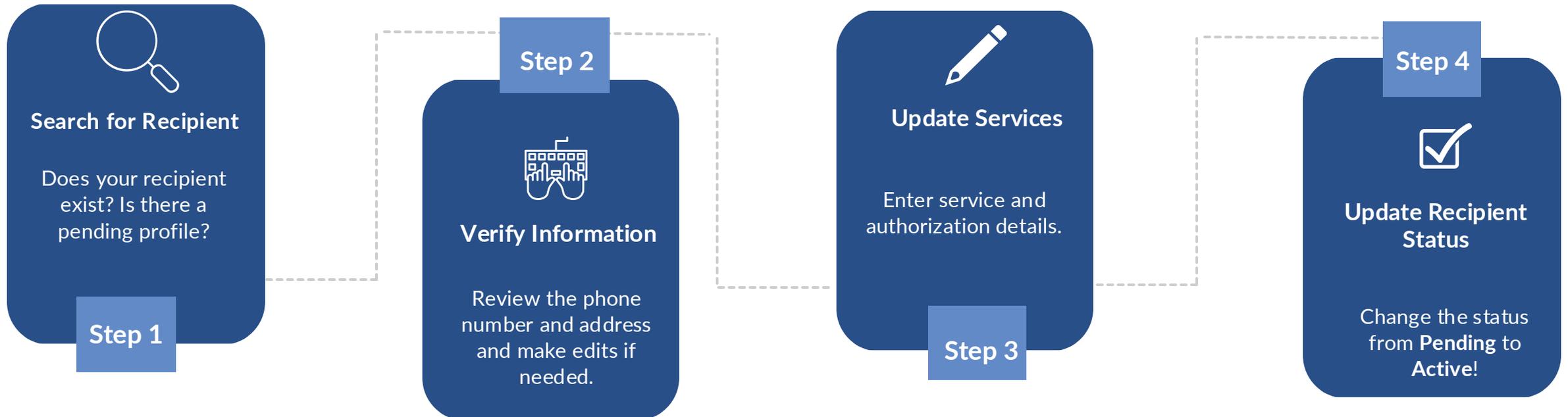




# Setting up Recipient Profiles



# Steps to Setting up a Recipient



# Step 1: Verify Information



1. Navigate to **Recipient > Recipient Management**.
2. In search bar, type in Recipient Name; click enter.

Does the recipient appear in list view? Is there a pending profile? If no, follow steps below to create recipient.

1. Select **Create Recipient**.
2. Fill in required fields, which include: **Date of Birth (DOB), program, Medicaid ID, and payer**.
3. Select **Search**. If this recipient exists in the MMIS, the first and last name will automatically populate.
4. Select **Create Recipient**.

### New Recipient

**\*Required**

ODA Only / No Medicaid ID

Newborn

Last Name

First Name

Date Of Birth\*

Program\*

Payer\*

Medicaid ID\*

Client Payer ID

SSN

Phone

[CANCEL](#)

# Step 2: Verify Information



1. Recipient Profile screen populates.
2. Review Recipient personal identifiers, including addresses and phone numbers.
3. If you are editing/updating profile, ensure you select **Save** at the end.

[← BACK](#) **Davis, Daniel** DD | Active

Recipient ID: 143427 | Medicaid ID: 999999999996 | Main Address: 40501 Hartford Hwy | Phone No: (203) 555-4000 | Main Em

[Personal\\*](#) [Program](#) [Schedules](#)

### Identifiers

|              |        |             |              |
|--------------|--------|-------------|--------------|
| Recipient ID | 143427 | Medicaid ID | 999999999996 |
| SSN          | -      | Agency ID   | 999999999996 |

### Personal Information

|                |              |         |    |
|----------------|--------------|---------|----|
| Recipient Name | Daniel Davis | Newborn | No |
| Date of Birth  | -            | Gender  | -  |
| Language       | -            |         |    |

### Addresses | Phone Numbers

[REQUEST DEVICE](#) [ADD](#)

[📍](#) 40501 Hartford Hwy [📞](#) (203) 555-4000 [Home](#) [Main Address](#) [Billing](#) [⋮](#)

# Step 3: Update Services

1. Navigate to **Program** tab.
2. Add Services for recipient; fill out required fields, including **Service, Start and End Date.**
3. Add Authorizations for recipient; fill out required fields, including **Payer, Service, Event Code, Format, and Start and End Date.**

[Creating Recipient Authorizations](#)

[ODM EVV Program and Service Code Guide](#)



**Service Details** [Close]

\* Required

**Service**

Service\*  
Select Service [Dropdown]

Start Date\* 01/11/2022 [Calendar] End Date Enter End Date [Calendar]

CANCEL [SAVE AND ADD ANOTHER] [SAVE]

**Authorization Details** [Close]

\* Required

**General Info**

Payer\* DODD [Dropdown] Authorization Number AMP20250224XXXXXXXX [Text]

Service\* Select Service [Dropdown] Modifiers: 1: [Input] 2: [Input] 3: [Input] 4: [Input]

Event Code\* Select Event Code [Dropdown] Format\* Select Format [Dropdown]

Voided

**Date Range**

Start Date\* 02/24/2025 [Calendar] End Date\* Set End Date [Calendar]

# > Step 4: Update Status



1. Navigate to **Program** tab.
2. Update Status to **Active**.

The screenshot displays a web application interface for updating a payer's status. On the left, a 'Payer Details' form contains the following information:

|                       |                 |
|-----------------------|-----------------|
| Payer Name: ODA       | Medicaid ID: -  |
| Rank: 1               | Group Number: - |
| Recipient Payer ID: - | End Date: -     |
| Start Date: -         |                 |

On the right side of the form, there is a dropdown menu for the status. The current status is 'Pending'. The dropdown menu is open, showing the following options:

- Pending
- Active
- On Hold
- Discharged
- Cancelled



Visit Counts By Exceptions Visit Counts By Status

Date Range Today

Visit Exceptions

|                          |   |
|--------------------------|---|
| Unknown Recipients       | 0 |
| Unknown DCW/Employees    | 0 |
| Visits Without Any Calls | 0 |
| Visits Without In-Calls  | 0 |
| Visits Without Out-Calls | 0 |
| Late In-Call             | 0 |
| No Show Exception        | 0 |
| Missing Service          | 0 |

Visit Exception Count Per Day

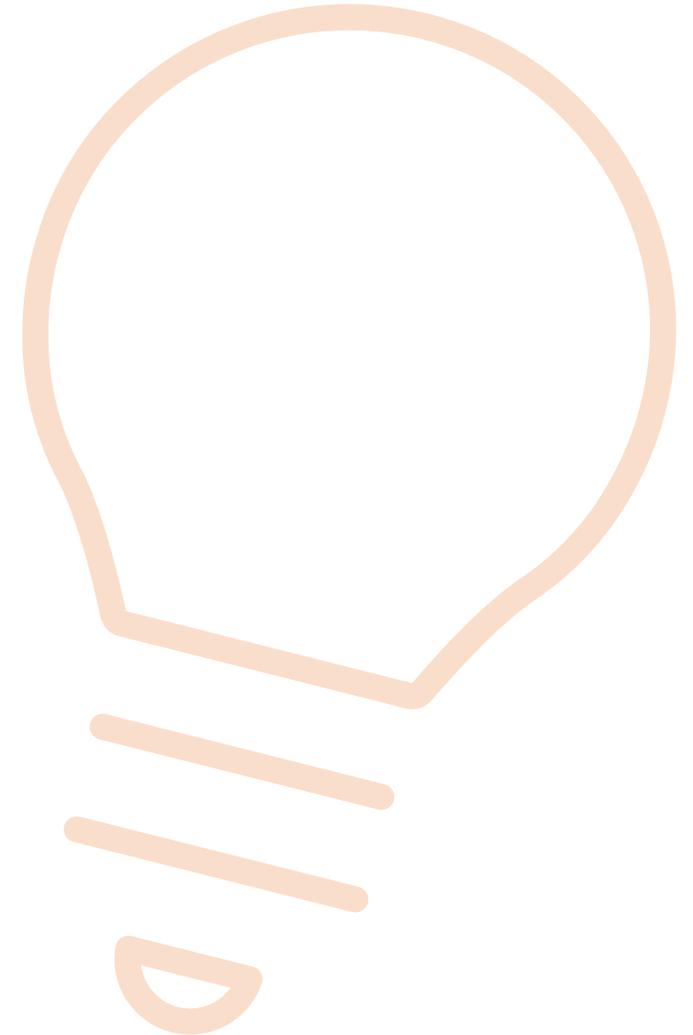


## Knowledge Check-Recipient Profile



**Which is NOT required to create a Recipient profile ?**

- A. Medicaid ID
- B. Date of Birth
- C. Payer
- D. Last Name & First Name

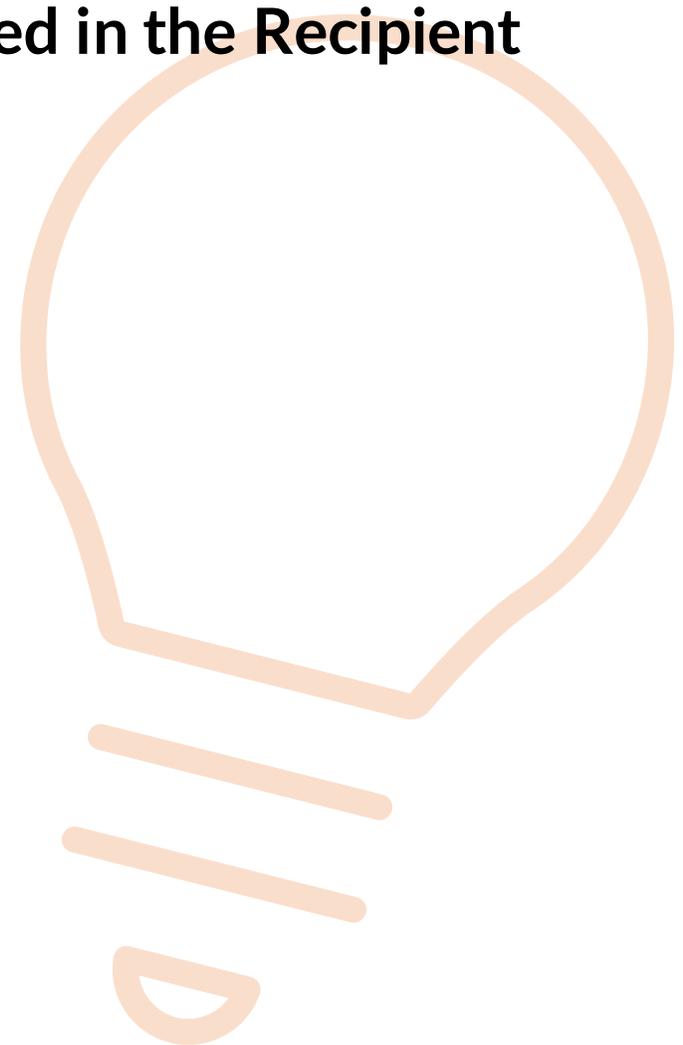


## Knowledge Check-Recipient Authorizations



**To prevent EVV claim errors, what should be reviewed in the Recipient Program tab? Select three.**

- A. EVV Authorizations
- B. Payers
- C. Service Codes
- D. Address





# Creating DCW/Employee Profiles



# Independent Providers – your DCW/Employee records have been created!



This information has been created for Independent Providers; there is no need to create a DCW/Employee.

Mobile is enabled by default.

If edits are needed, providers will need to update information in the PNM (Provider Network Management) System.

Please allow for changes to process then review in Sandata EVV.



## Creating DCW/Employee – Agency Providers Only



1. Navigate to **DCW/Employee** module > **Create DCW/Employee**.
2. Fill out all required fields.
3. Toggle mobile access next to mobile user if this DCW/Employee will be using the Sandata Mobile Connect (SMC) App.
4. Select **Create DCW/Employee**.
5. Providers can now edit/add personal information, addresses and personal identifiers.

CREATE DCW/EMPLOYEE

Q Type here for a quick search... FILTERS EXPORT DATA IMPORT

| NAME                 | STATUS | SANTRAX ID | DCW/EMPLOYEE ID | POSITION                       | HIRED DATE | RELEASED DATE | UPDATE AS OF |
|----------------------|--------|------------|-----------------|--------------------------------|------------|---------------|--------------|
| Andrea, Test         | Active | 163636     | 000163636       | CGV - Caregiver                | 06/01/2024 |               | 06/01/2024   |
| Bergstrom, Kelly     | Active | 140749     | 140749          | CGV - Caregiver                | 05/01/2024 |               | 07/02/2024   |
| Blum, Aaron          | Active | 407276     | 407276          | CGV - Caregiver                | 07/02/2024 |               | 07/04/2024   |
| Brown, Janice        | Active | 195475     | 000195475       | CGV - Caregiver                |            |               | 06/25/2024   |
| Burrito, Steak       | Active | 448761     | 448761          | CGV - Caregiver                | 05/01/2024 |               | 06/25/2024   |
| Casey, Barbara       | Active | 192924     |                 | LPN - Licensed Practical Nurse | 07/02/2024 |               | 07/02/2024   |
| Cole, Patricia       | Active | 626333     | 000626333       | CGV - Caregiver                |            |               | 06/25/2024   |
| CROP, CROPPER        | Active | 2697719254 |                 | CGV - Caregiver                | 06/29/2024 |               | 06/30/2024   |
| DARLING, DARLA       | Active | 877859     |                 | CGV - Caregiver                | 03/01/2023 |               | 06/01/2024   |
| Day, Sunny           | Active | 491626     |                 | CGV - Caregiver                | 12/03/2024 |               | 12/03/2024   |
| Doe, John            | Active | 130200     | 000130200       | CGV - Caregiver                |            |               | 06/25/2024   |
| Doe, Marvin          | Active | 130841     | 000130841       | CGV - Caregiver                |            |               | 06/25/2024   |
| DOLLAR, HOLLAR       | Active | 343904     |                 | CGV - Caregiver                | 06/30/2024 |               | 06/30/2024   |
| Dowdrick, Eric       | Active | 813836     |                 | HHA - Home Health Aide         | 07/01/2024 |               | 07/02/2024   |
| Dowdrick, SMC        | Active | 987071     |                 | HHA - Home Health Aide         | 07/03/2024 |               | 07/03/2024   |
| Dowdrick, Test       | Active | 741125     | 022025          | HHA - Home Health Aide         | 02/11/2025 |               | 02/11/2025   |
| Ellis, Edward        | Active | 688755     | 000688755       | CGV - Caregiver                |            |               | 06/25/2024   |
| Employee, January M. | Active | 551401     | 000551          | CGV - Caregiver                | 06/01/2020 |               | 06/25/2024   |
| Employee, Maria M.   | Active | 168899     | 000168899       | CGV - Caregiver                |            |               | 06/25/2024   |
| Employee, Marz       | Active | 109097     | 000109097       | CGV - Caregiver                |            |               | 06/25/2024   |
| Employee, Test       | Active | 12345      | 012345          | CGV - Caregiver                | 07/09/2024 |               | 07/09/2024   |
| Employee, Test       | Active | 205377     | 205377          | CGV - Caregiver                | 07/01/2020 |               | 06/25/2024   |

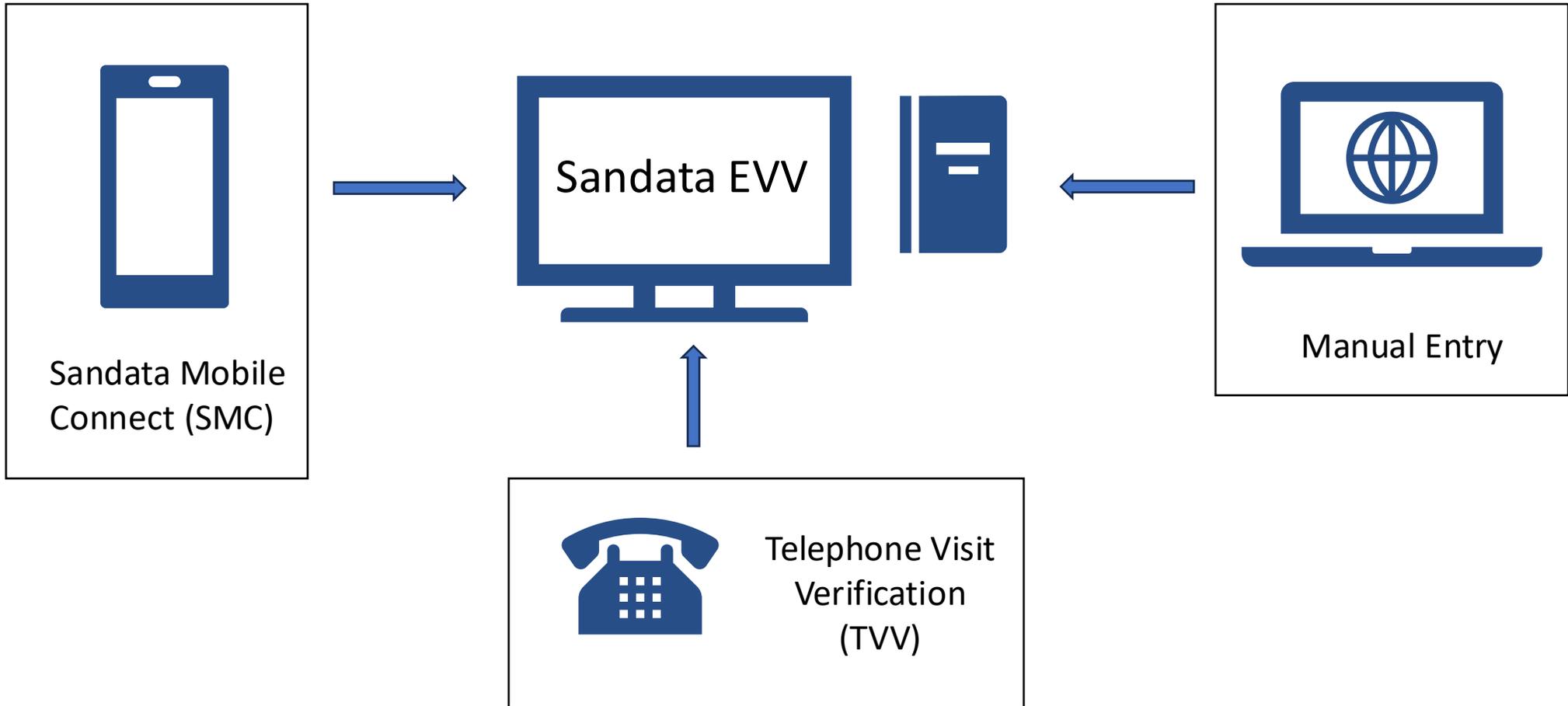
Edit CROP, CROPPER

# EVV Checkpoints

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# Visit Capture Methods





# EVV Agency Checkpoints

Enable Your Employees to Perform EVV



Depending on your EVV Clock In/Out method, make sure you locate and enable the following:



Enable  
Mobile User



Locate the  
DCW/Employee  
Passcode  
(Santrax ID)



Locate  
the Sandata  
EVV 800 #



Locate the  
Recipient ID  
or Medicaid  
ID



Run Active  
DCW/Employees  
and  
Active Recipients  
Report



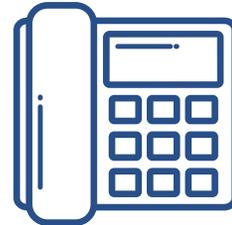
Depending on your EVV Clock In/Out method, make sure you locate and enable the following:



Enable  
Mobile User



Locate the  
DCW/Employee  
Passcode  
(Santrax ID) and  
TVV Pin



Locate  
the TVV #



Locate the  
Recipient ID  
or Medicaid  
ID



Run Active  
DCW/Employees  
and  
Active Recipients  
Report



# Sandata Mobile Connect (SMC)

# Enabling Mobile User



SMC logins are created when the DCW/Employee is in the Sandata EVV system and enabled as a **mobile app user**.

**Note:** Ensure that an email address is listed for employee to receive temporary mobile password!

**Edit Address and Phone Number**

\* Required

Address Label  
Enter Address Label

Address Line 1  
Enter Address Line 1

Address Line 2  
Enter Address Line 2

Address Type  
Select Address Type

Zipcode  
\_\_\_\_-\_\_\_\_

City  
Enter City

County  
Enter County

State  
Select State

Mobile Phone Number\*  
(231) 555-1234

Email Address  
Enter Email Address

Use as main address

Mobile user

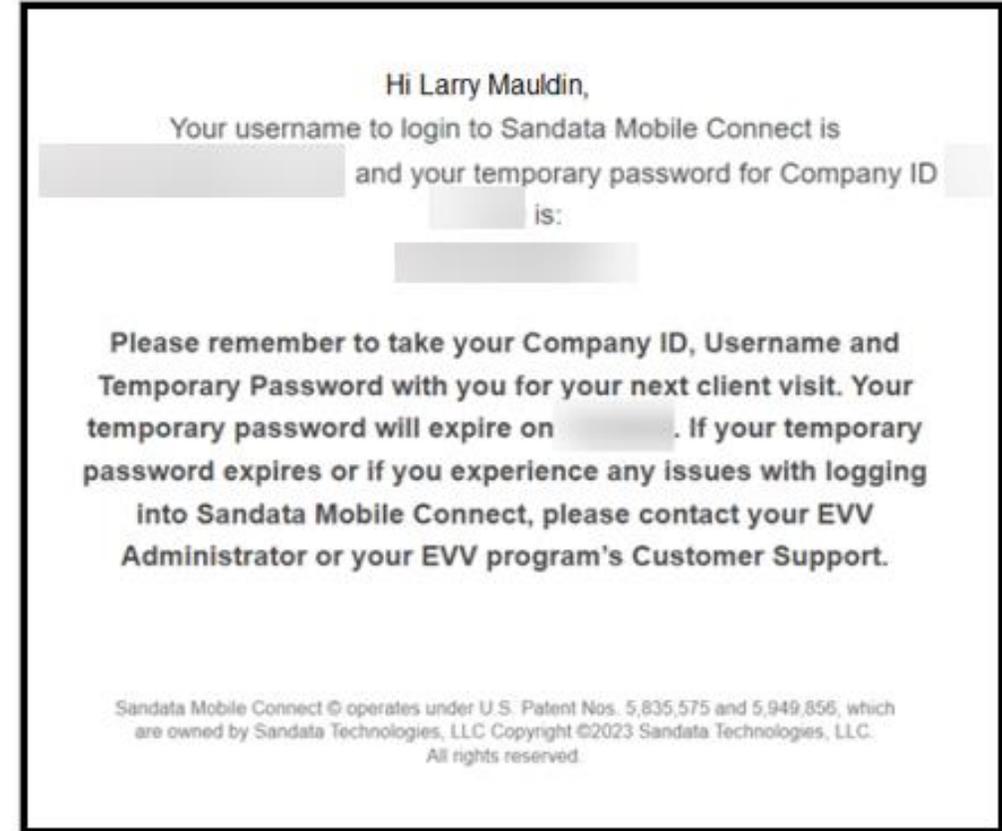
+ Add number

CANCEL RESET MOBILE USER PASSWORD SAVE

# > Email Confirmation to DCW/Employee



- Once set up, the DCW/employee will receive an email that includes:
  - Username
  - Temporary password
  - Company ID



# First Time Log In



Once the DCW/Employee downloads and opens app, they will enter in the information provided in the email to start their visits.

**Sandata Mobile Connect**

roger.brown

.....

2-45567

Remember Me

**Sign In**

Reset Password

**Sandata Mobile Connect**

s.anderson@eastvalleyhospice.com

.....

East Valley Hospice 423178

Marigold Caregivers 561234

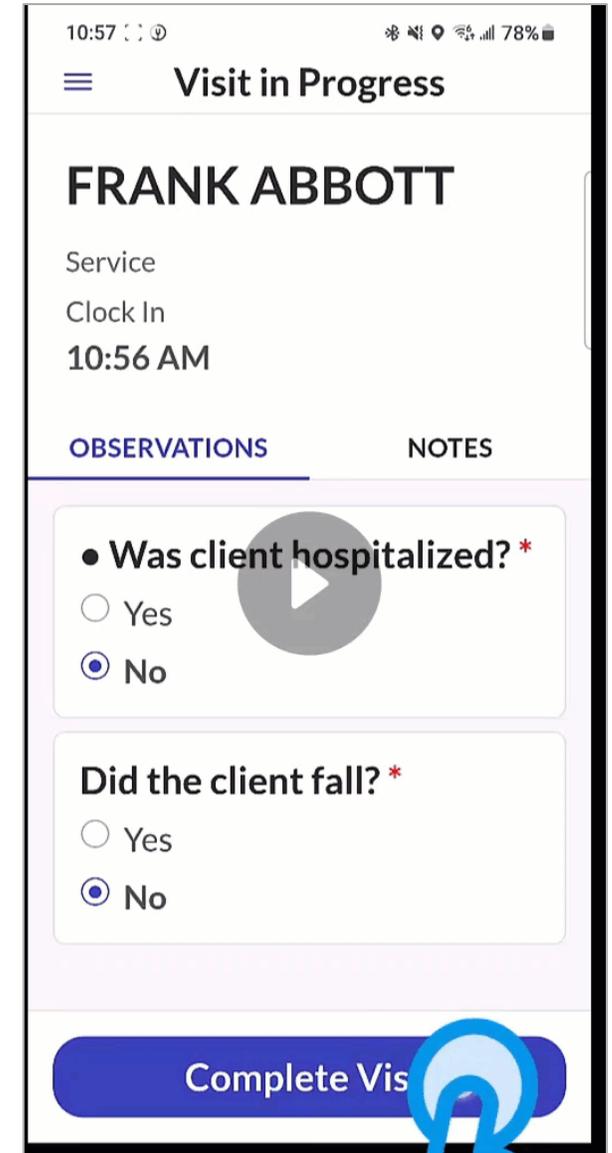
East Valley Hospice 423178

Marigold Caregivers 5619817

# Sandata Mobile Connect



- SMC can be used from a cell phone or Wi-Fi-enabled device to clock in and out of visits.
- Can work in an 'offline' mode. Visit data will appear once DCW/Employee's device has reconnected to cellular service or Wi-Fi.





# Telephony Visit Verification (TVV)



- Available as an alternate to the mobile (SMC) call in/call out process.
- When using TVV, the DCW/Independent Provider can call in/call out from any authorized phone number listed in the Recipient record.

# Locating DCW/Employee Passcode



If DCW/Employee will be utilizing TVV for EVV capture, make sure to provide the employee with Santrax ID to successfully call in and call out.

**Navigate to DCW/Employee Record > Personal Tab**

**Note (Independent Providers):**  
Passcode is equivalent to the TVV Pin.

DCW/Employees / Edit DCW/Employee

< BACK **Para, Paloma**

DCW/Employee ID: 990000000 | Phone No: (850) 232-1111 | Email Address: p.paloma@hhaexchange.com | Main Emergency Contact: --

**Personal** Schedules

**Identifiers**

|                      |           |                |                |
|----------------------|-----------|----------------|----------------|
| SSN                  | -         | Passcode       | 123456         |
| Status               | Active    | Effective Date | Jun 27, 2024   |
| DCW/Employee ID      | 990000000 | Position       | CGV- Caregiver |
| Hire Date            | -         | Supervisor     | -              |
| National Provider ID | -         | Santrax ID     | 839205         |

# Locating Recipient ID/Phone Line



Providers can locate the Recipient ID and phone number in the Recipient profile to provide to DCW/employees for calling in and calling out.

**Identifiers** 

|              |        |             |                |
|--------------|--------|-------------|----------------|
| Recipient ID | 748558 | Medicaid ID | ██████████ 299 |
| SSN          | -      | Agency ID   | ██████████ 299 |

**Addresses | Phone Numbers** [ADD](#)

|  |  |              |   |
|--|--|--------------|---|
|  400 ANYWHERE |  (501) 444-4444 | Main Address |  |
|--|--|--------------|---|



Visit Counts By Exceptions Visit Counts By Status

Date Range Today



Visit Exceptions

|                          |   |
|--------------------------|---|
| Unknown Recipients       | 0 |
| Unknown DCW/Employees    | 0 |
| Visits Without Any Calls | 0 |
| Visits Without In-Calls  | 0 |
| Visits Without Out-Calls | 0 |
| Late In-Call             | 0 |
| No Show Exception        | 0 |
| Missing Service          | 0 |

Visit Exception Count Per Day



Navigate Modules

Dashboard

Recipients

DCW/Employees

Scheduling

Visit Maintenance

Reports

XREF

Security

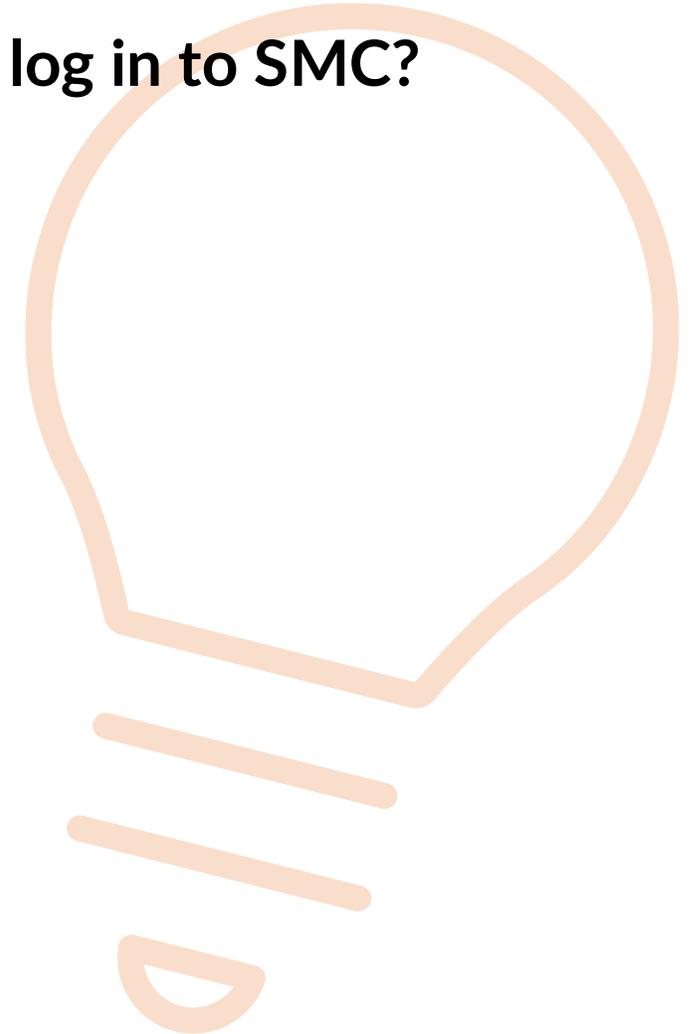
Messaging

## Knowledge Check- SMC User



**What does the DCW/Employee need during the initial log in to SMC?  
Select three.**

- A. Temporary Password
- B. Recipient ID
- C. Company ID
- D. Username





# Exporting Data

# Exporting Data from List Views



Sandata EVV offers providers the ability to export data. This can be used as a reporting tool when needing to verify your recipients, DCW/Employees.

**Downloadable options include: CSV, Excel, PDF**

| RECIPIENT        | STATUS   | PROGRAM | SUPERVISOR  | RECIPIENT ID | MEDICAID ID  | RECIPIENT PAYER ID | AS OF   | SOC     | EOC | SERVICES     |
|------------------|----------|---------|-------------|--------------|--------------|--------------------|---------|---------|-----|--------------|
| ⊕ AB, ABBY       | ● Active | SP      |             | 369952       | 221188773344 | 221188773344       | 3/15/24 | 3/15/24 |     | G0156, G0300 |
|                  | ● Active | DD      | Adams, John | 369952       | 221188773344 | 221188773344       | 6/3/24  | 6/3/24  |     | G0493, HPC   |
| ⊕ Andrews, Scott | ● Active | DD      |             | 113415       | 677774493811 | 677774493811       | 3/17/24 | 3/17/24 |     | G0493, RR    |
| ⊕ ART, ARTE      | ● Active | SP      |             | 954665       | 557711220099 | 557711220099       | 3/15/24 | 3/15/24 |     | T1001        |



Visit Counts By Exceptions

Visit Counts By Status

Date Range

Today

Visit Exceptions

|                          |   |
|--------------------------|---|
| Unknown Recipients       | 0 |
| Unknown DCW/Employees    | 0 |
| Visits Without Any Calls | 0 |
| Visits Without In-Calls  | 0 |
| Visits Without Out-Calls | 0 |
| Late In-Call             | 0 |
| No Show Exception        | 0 |
| Missing Service          | 0 |

Visit Exception Count Per Day



- Navigate Modules
- Dashboard
- Recipients
- DCW/Employees
- Scheduling
- Visit Maintenance
- Reports
- XREF
- Security
- Messaging



# Preparing your DCW/Employees

# ➤ Preparing DCW/Employees

## You should determine...

- How do your DCW/Employees use technology today?
- What appeals to your DCW/Employees?
- Where they are in the DCW/Employees lifecycle?

## Training DCW/Employees

1. Require your DCW/Employee to download the SMC mobile app during training.
2. Take advantage of EVV training tools and provide documentation.
3. Document the recipient ID and leave it in a folder near the phone in the recipient's home.
4. Set expectations and check in.





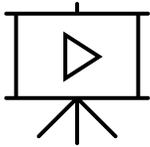
- [Sandata Mobile Connect Documentation](#)
- Documentation on:
  - Downloading and Logging in to mobile app.
  - Starting a visit using the mobile app.
  - [Ohio Service List](#)



The screenshot shows the Sandata website interface. At the top, there is a navigation bar with links for "Sandata News", "New User Sign Up", "Submit a request", and "Sign in". Below this is a search bar with the text "Search" and a "Search" button. The main content area features a breadcrumb trail: "Sandata On-Demand / Sandata Learn / Product Help / Payer Programs / Caregiver and CDS Client Library / EVV Vendor Solutions / Provider". Below the breadcrumb trail, there is a sub-breadcrumb trail: "Sandata Technologies / Payer Programs / Ohio (OH ODM) / Ohio User Guides / Visit Capture / Sandata Mobile Connect (SMC) English". The main heading is "Sandata Mobile Connect (SMC) English". Below the heading is a "Follow" button. The content area lists several topics related to Sandata Mobile Connect visits:

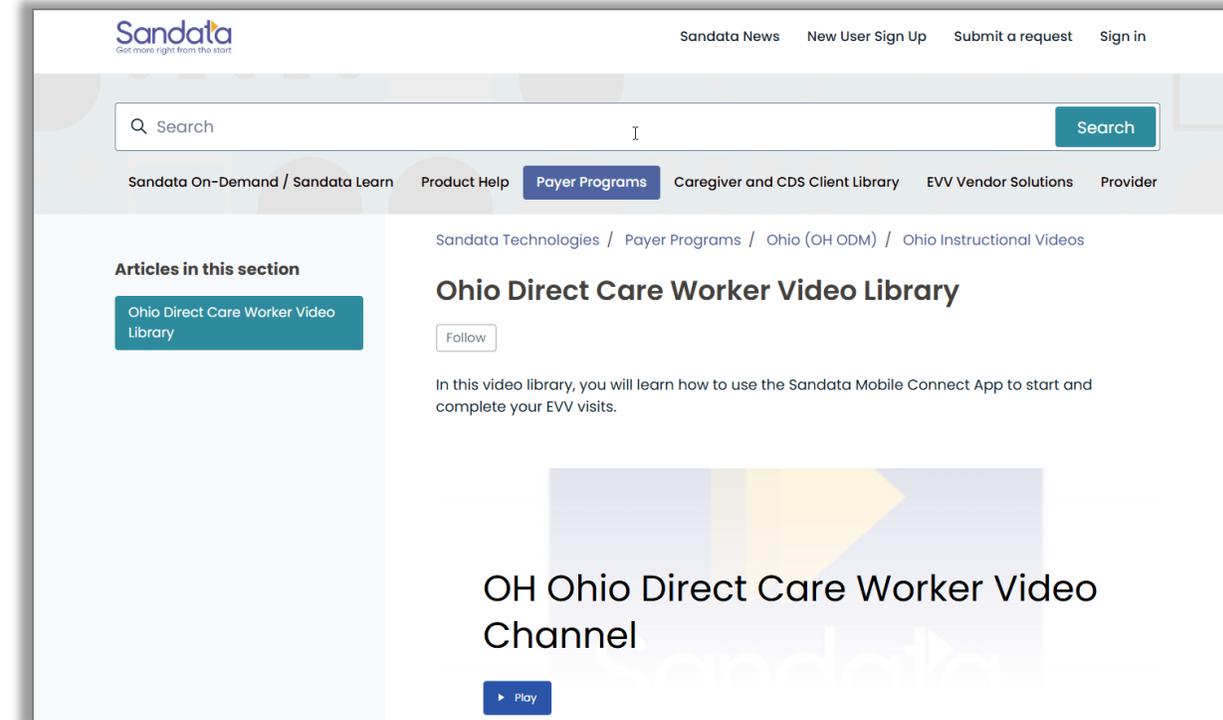
- Sandata Mobile Connect Login
- Starting an Unscheduled Sandata Mobile Connect Visit
- Starting a Scheduled Sandata Mobile Connect Visit
- Starting an Unknown Sandata Mobile Connect Visit
- Completing a Sandata Mobile Connect Visit

# DCW/Employee Video Library



- [Ohio Direct Care Worker Video Library](#)

- Videos on:
  - Starting and completing a visit
  - Resetting and changing a password
  - TVV call in and out





# Key Takeaways

# Key Takeaways – Data Entry



- Ensure the recipient(s) profile status is set to Active prior to capturing EVV visits.
- Edit and/or add services, authorizations and Medicaid ID to reduce visit exceptions and EVV claim errors.
- Individual providers who need to update DCW/Employee profiles need to update in PNM system first.
- Ensure that your DCW/Employees are enabled to use SMC.
- Provide resources to your DCW/Employees for training to reduce visit exceptions.
- Alt EVV Providers – work with your Alt EVV vendor to create Recipient and DCW/Employee records to capture visits.



# Resources



## Provider Resources



### Ohio User Guides:

- [Ohio User Guides](#)
- [Recipient User Guide](#)
- [DCW/Employee User Guide](#)
- [Ohio Claims Validation: Handling Claims Denials- Sandata Technologies](#)

### Claims Matching:

- [Get Ready for Claims Matching Recording](#)



## EVV Support



### Need Assistance?

- Contact the EVV Provider Hotline at 855-805-3505 [Submit a Zendesk Ticket](#)
- Attend Daily Office Hours – [Register for ODM EVV Office Hours!](#)
- [EVV Contact Information](#)

### Alt EVV Providers – need help?

For additional support, please contact the Technical Support Alternate EVV team at either options below:

- Phone: 1-844-289-4246
- Email: [OHAltEVV@Sandata.com](mailto:OHAltEVV@Sandata.com)

### Ohio Department of Medicaid

- [Ohio Department of Medicaid Website](#)
- [Electronic Visit Verification](#)



# Questions?



Register for Mastering Visit  
Maintenance Webinar 3/11

**THANKS FOR  
ATTENDING!**



*Please provide us your feedback  
after exiting the webinar.*