

# Our Visit Maintenance Q&A Webinar Will Begin Shortly

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Q&A



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# Visit Maintenance Q&A

March 2025

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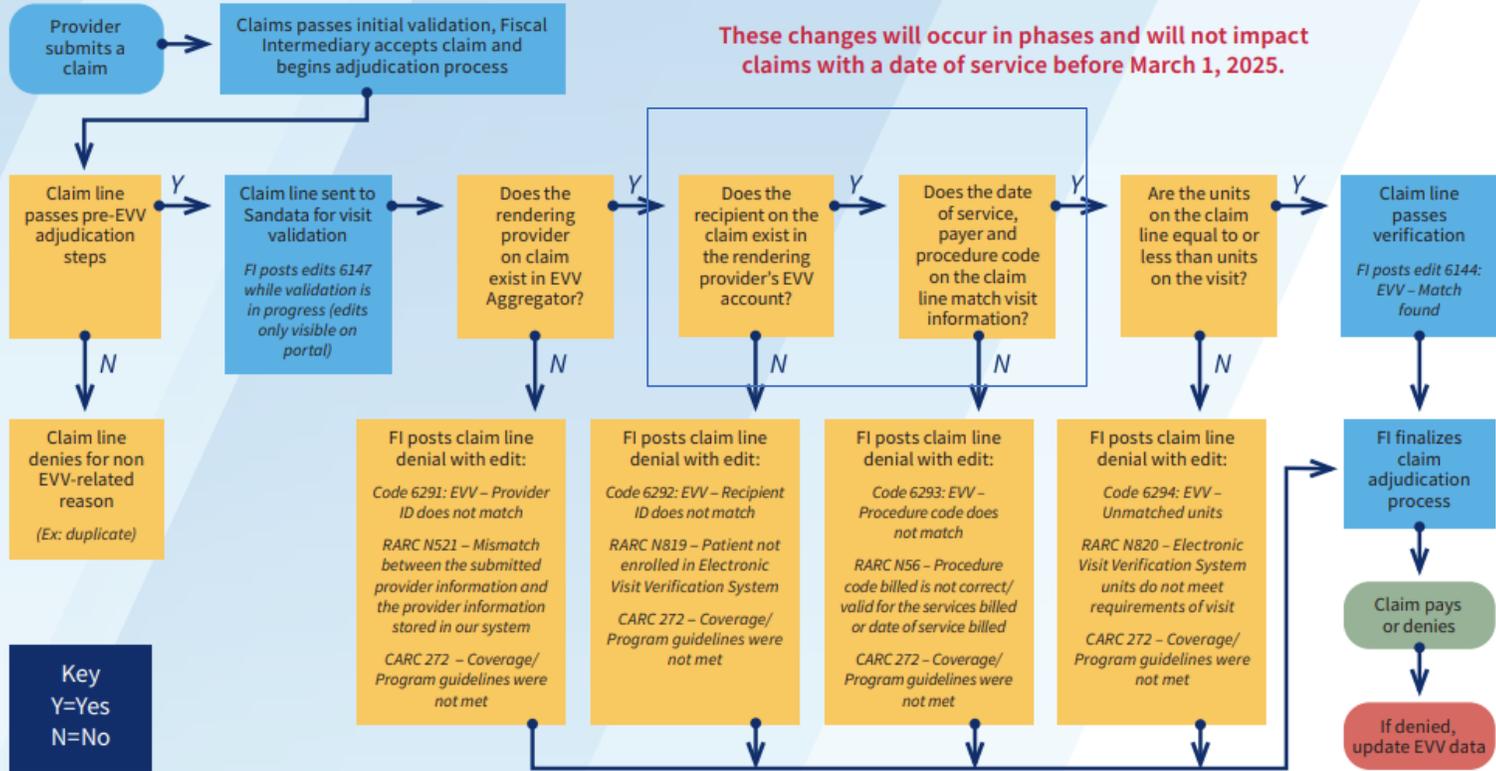
# Agenda – Visit Maintenance Q&A

- How to Review all Exceptions on Visit
- How to resolve an Unauthorized Service Exception
- Where to Locate previously recorded trainings
- How to adjust a call in/out
- Recommended timeframe to perform Visit Maintenance
- Difference between Create Call and Create Visit
- What if a DCW works in an area with little reception
- Support Resources

# Electronic Visit Verification Claims Validation Process



## ELECTRONIC VISIT VERIFICATION CLAIMS VALIDATION PROCESS



Phase 1 includes providers which are Home Health FFS claims billed to ODM.

This includes the service codes:

- G0156 - Home health aide
- G0151 - Home health physical therapies
- G0152 - Home health occupational therapies
- G0153 - Home health speech language pathology therapies
- G0299 - Home health nursing registered nurse (RN)
- G0300 - Home health nursing licensed practical nurse (LPN)

# What Happens during the Visit Capture?



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





# How to Review all Exceptions on a Visit



# Question: How to Review all Exceptions



**Question: I fixed all the exceptions with a red warning, but the visit is still in the incomplete status**

**Answer: Go into Visit Detail and go to Exception tab to see if there are any other exceptions.**

Steps:

1. Navigate to Visit Maintenance and locate visit
2. Select Visit Date to open Visit Details
3. Select Exceptions tab in Visit Details



# How to Review all Exceptions on a Visit Demo

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

CREATE VISIT CREATE CALL

FILTERS

There are no records matching the provided search criteria



# Where to locate previously recorded trainings



# Question: Where can I locate previously recorded trainings



Question: Where can previous webinar recordings be found

Answer: [Ohio Agency Provider Training – Sandata Technologies](#)

The screenshot shows a web browser window displaying the Sandata website. The URL in the address bar is sandata.zendesk.com. The page features the Sandata logo at the top left and navigation links for Sandata News, New User Sign Up, Submit a request, and Sign in. A search bar is prominently displayed. Below the search bar, there is a navigation menu with options like Sandata On-Demand, Sandata Learn, Product Help, Payer Programs (which is highlighted), Caregiver and CDS Client Library, EVV Vendor Solutions, and Provider. The main content area shows the breadcrumb trail: Sandata Technologies / Payer Programs / Ohio (OH ODM) / Ohio Agency Provider Training. The title of the page is "Ohio Agency Provider Training" with a subtitle: "A place to learn how to be successful with Sandata EVV. Choose a topic below." There is a "Follow" button. A list of training topics is shown with right-pointing chevrons: Data Entry, Claims Matching, and Daily Office Hours. The footer contains copyright information for © 2025 HHAeXchange and links to Sandata.com, Compliance Documentation & Reports, and Security & Privacy Information.



# Recommended timeframe to perform Visit Maintenance



## **Question: What is the Recommended timeframe to perform Visit Maintenance?**

**Question:** How often should I perform Visit Maintenance?

**Answer:** We recommend performing Visit Maintenance on a daily basis.

Steps:

1. Navigate to the Visit Maintenance module
2. You will see exceptions from the current day.

**Note:** Use the filter button to change date range.



# How to use Filters in Visit Maintenance Demo



CREATE VISIT

CREATE CALL

FILTERS

SHOW DISPLAY OPTIONS

EXPORT DATA

APPROVE ALL

DISAPPROVE ALL

Show Legend

RECIPIENT NAME	DCW/EMPLOYEE NAME	PAYER	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL	UNITS	
AB, ABBY	Adams, John	DODD	HPC	03/12/2025				08:00 AM	<span style="color: red;">●</span>		08:00 AM			[---]	In Process	<input type="checkbox"/>		
										Total:			00:00					



25 of 1 entries

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



**What if a DCW works  
in an area with little  
reception?**



# Question: What should a DCW do if they work in an area with poor internet connectivity?

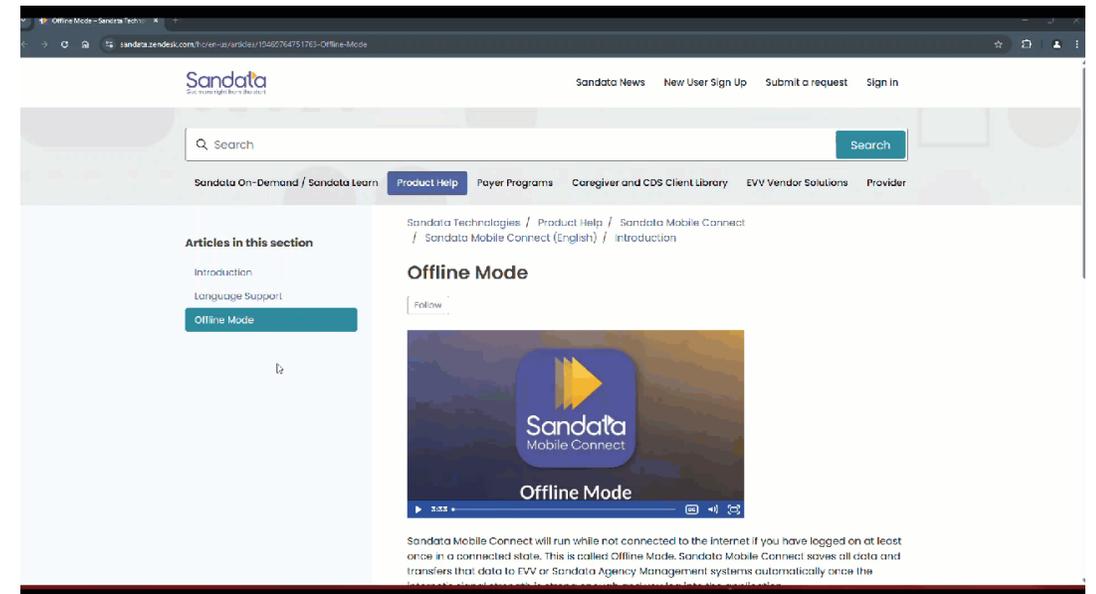


**Question: My DCW uses the Sandata mobile app (SMC) and works in an area where there is little to no Internet connectivity. What should they do if they have trouble clocking in/out?**

**Answer: Caregiver can clock in/out in offline mode. The app will display reminders to let the DCW they are in offline mode. In offline mode certain features are not available and the DCW would need to start the visit as an Unknown Visit. Sandata mobile app saves all data and transfers that data to Sandata EVV once the internet's signal strength is strong enough and you log in to the app.**

**Another option is to use Telephony to clock in and out.**

## [Offline Mode – Sandata Technologies](#)





# How to resolve an Unauthorized Service Exception



# Question: How to resolve an Unauthorized Service Exception



**Question:** I have visits on Visit Maintenance with the Unauthorized Service exception. How do I correct this exception?

**Answer:** This error could be caused by a variety of issues including:

- Missing or expired EVV authorization
- Missing or incorrect service code
- Missing Payer
- Recipient is missing in Sandata
- DCW entered incorrect Service when clocking in/out

First, we look at the visit to see what information the DCW entered we clocking. Next, we compare that info to the details on the program tab of recipient. If any of the information is missing or incorrect we need to add it or update it. If the information on the program tab is correct, we need to make the appropriate changes on the visit.



## Steps to Resolve Unauthorized Service Exception



1. Navigate to **Visit Maintenance** and locate visit.
2. Select the red dot under the **Service** column
3. Review the **Recipient name, Payer, Program, and Service** associated to this visit.
4. Navigate to **Recipient > Recipient Management** and locate the Recipient using Quick Search or Filters.
5. Select **Recipient Name** to view their record; select the **Program** tab.
6. Confirm that the **Payer, Program, Service and Authorizations** entered are correct. If not, make required changes.
7. If the information is correct, return to Visit Maintenance; on the **General** tab of the visit, make necessary corrections to the **Payer, Program, and Service**.
8. Select **Reason Code**, enter reason note (optional), and select **Save**.



# How to resolve an Unauthorized Service Exception Demo

CREATE VISIT CREATE CALL

FILTERS SHOW DISPLAY OPTIONS EXPORT DATA

Show Legend

APPROVE ALL DISAPPROVE ALL

RECIPIENT NAME	DCW/EMPLOYEE NAME	PAYER	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL
JENKINS, ANGELA	Blum, Aaron	Aetna	MyCare - HCA (S5125)	12/05/2024				12:00 PM	02:00 PM	02:00	12:00 PM	02:00 PM		02:00	Verified	<input type="checkbox"/>
JENKINS, ANGELA	TESTER, MARIA	Aetna	MyCare - HCA (S5125)	12/01/2024				12:00 PM	04:02 PM	04:02	12:00 PM	04:02 PM		04:02	Incomplete	<input type="checkbox"/>
										Total:			06:02			



25 of 2 entries

« < 1 > »



# How to adjust a Call In/Out



# Question: How do I adjust a Call In/Out?



**Question: My DCW was unable to clock in because they needed to tend to the recipient immediately. Once the situation was under control the DCW clocked in, but it was a half hour after they first got there. How can I change the In call to the actual time the DCW arrived?**

**Answer: You need to locate the visit and adjust the In time**

**Steps:**

- 1. Locate visit and select the visit date to open Visit Details**
- 2. On the General tab enter the correct time in in the Adjusted In field**
- 3. Select the Reason Code, enter Reason Note (optional) and select Save**



# How to adjust In/Out Call Demo

CREATE VISIT CREATE CALL

FILTERS SHOW DISPLAY OPTIONS EXPORT DATA

APPROVE ALL DISAPPROVE ALL

Show Legend

RECIPIENT NAME	DCW/EMPLOYEE NAME	PAYER	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL	U
HOOVER, SHARON	Berger, Donna	ODM	Physical Therapies (G0151)	01/30/2025				12:00 PM	07:00 PM	07:00	12:00 PM	07:00 PM	07:00	07:00	Verified	<input type="checkbox"/>	28
AB, ABBY	Jones, Cares	DODD	HPC	01/30/2025				11:37 AM	04:00 PM	04:23	11:30 AM	04:00 PM	04:30	04:30	Verified	<input type="checkbox"/>	18
(772)237-9616	Jones, Cares			01/30/2025					11:36 AM			11:36 AM		[---]	Incomplete	<input type="checkbox"/>	
AB, ABBY	B, Nancy			01/30/2025				08:00 AM			08:00 AM			[---]	Incomplete	<input type="checkbox"/>	
(412)627-6340	judd, kristen			01/29/2025				01:48 PM			01:48 PM			[---]	Incomplete	<input type="checkbox"/>	
ART, ARTE	judd, kristen	Buckeye	RN Assessment (T1001)	01/29/2025	01:00 PM	03:00 PM	02:00							[---]	Incomplete	<input type="checkbox"/>	
AB, ABBY	Carson, Judy	Aetna	SPHH Nsg - LPN (G0300)	01/29/2025	09:00 AM	11:00 AM	02:00							[---]	Incomplete	<input type="checkbox"/>	
Test, Marco	BRAWN, BRAUNY	ODM	OHCW HCA (S5125)	01/28/2025	08:00 AM	10:00 AM	02:00							[---]	Incomplete	<input type="checkbox"/>	

- Navigate Modules
- Dashboard
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# What is the Difference between Create Call and Create Visit



# Question: What is the Difference between Create Call and Create Visit?



**Question: On Visit Maintenance there is a create Visit option and a Create Call option. What is the difference between the two?**

**Answer: Create Visit allows you to manually create a visit where the DCW did not clock In or Out. Create Visit allows you to clock In a DCW – which would allow them to clock out using the Sandata mobile app or Telephony.**

**Steps:**

- 1. On Visit Maintenance select either Create Visit or Create Call**



# How to Create Visit and Create Call Demo

CREATE VISIT CREATE CALL

FILTERS SHOW DISPLAY OPTIONS EXPORT DATA

APPROVE ALL DISAPPROVE ALL

Show Legend

RECIPIENT NAME	DCW/EMPLOYEE NAME	PAYER	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL
AB, ABBY	Jones, Cares			01/30/2025				11:37 AM			11:37 AM			[...]	Incomplete	<input type="checkbox"/>
(772)237-9616	Jones, Cares			01/30/2025					11:36 AM		11:36 AM			[...]	Incomplete	<input type="checkbox"/>
AB, ABBY	B, Nancy			01/30/2025				08:00 AM			08:00 AM			[...]	Incomplete	<input type="checkbox"/>
(412)627-6340	judd, kristen			01/29/2025				01:48 PM			01:48 PM			[...]	Incomplete	<input type="checkbox"/>
ART, ARTE	judd, kristen	Buckeye	RN Assessment (T1001)	01/29/2025	01:00 PM	03:00 PM	02:00							[...]	Incomplete	<input type="checkbox"/>
AB, ABBY	Carson, Judy	Aetna	SPHH Nsg - LPN (G0300)	01/29/2025	09:00 AM	11:00 AM	02:00							[...]	Incomplete	<input type="checkbox"/>
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ART, ARTE	judd, kristen	Buckeye	RN Assessment (T1001)	01/27/2025	01:00 PM	03:00 PM	02:00							[...]	Incomplete	<input type="checkbox"/>
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Navigate Modules

Dashboard

Recipients

DCW/Employees

Scheduling

Visit Maintenance

Reports

XREF

Security

Messaging

CREATE VISIT

CREATE CALL

FILTERS

There are no records matching the provided search criteria



# Additional Resources



# Provider Resources



- [Ohio User Guides](#)

Top Visit Maintenance Errors and How to Resolve:

- [Managing Exceptions](#)
- [Updating an Unknown Recipient](#)
- [Adjusting Call Times and Dates](#)
- [Ohio Claims Validation: Handling Claims Denials- Sandata Technologies](#)



# 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 Claims Matching  
Webinar  
3/18

**THANKS FOR  
ATTENDING!**



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