



Sandata EVV Enhanced New UI Guide

May 25, 2025

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Sandata

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

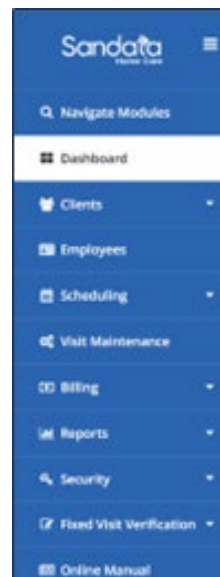
You'll discover the following in Sandata EVV Enhanced:

- 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

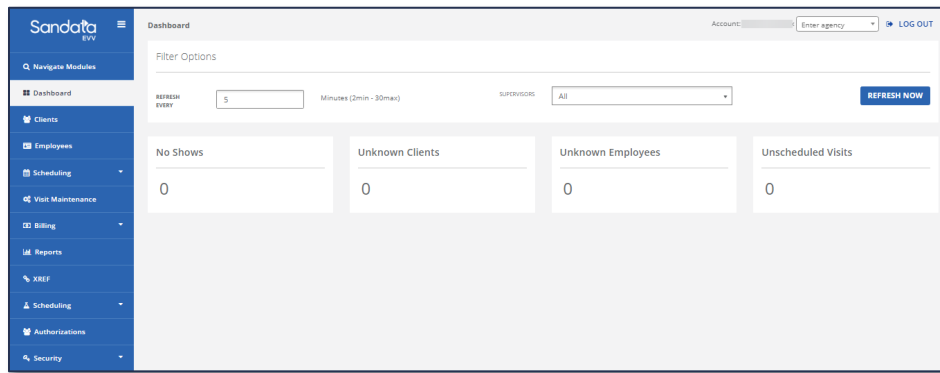
This document is intended for a general audience of Sandata EVV users and uses the Standard Configuration. Your state or payer may utilize a different configuration in the platform.

Navigation

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



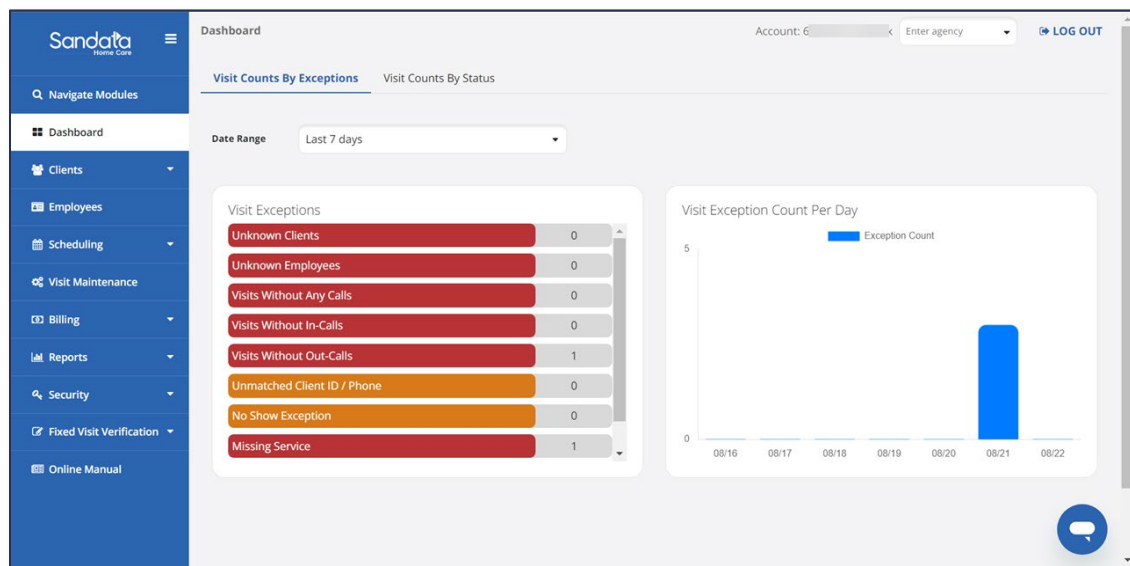
The Dashboard



Former Dashboard

Upon logging in, the landing page is a dashboard with snapshots of visit exceptions and visit statuses to guide users on steps to take in the Visit Maintenance module.

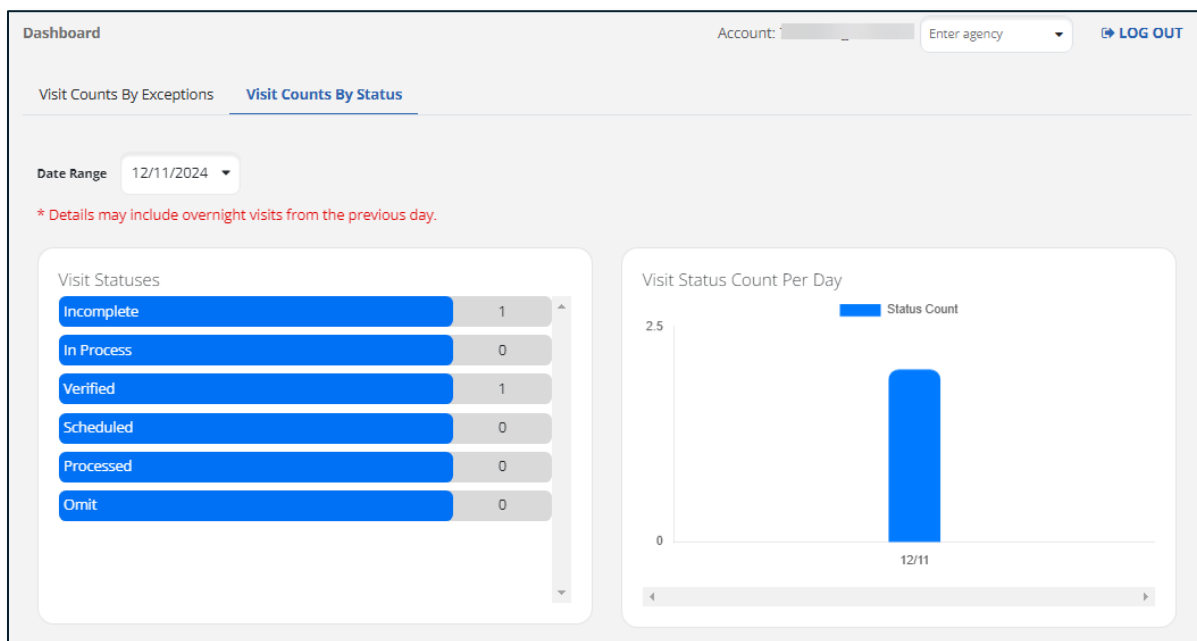
Visit exceptions display by color and type and can be filtered up to the last 7 days. The list on the left are the types of visit exceptions in the past 7 days. Exceptions shown will be specific to your program. On the right, a chart to see exception count by day displays, based on the chosen date range.



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.

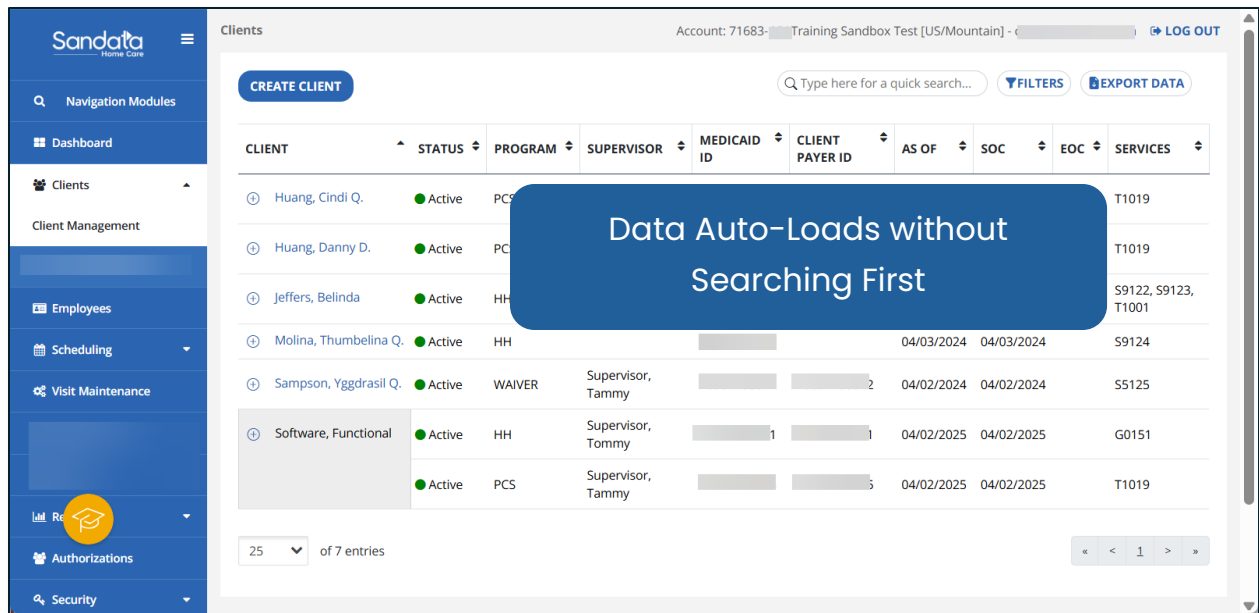


Visit Counts by Status Dashboard

Key Differences in the Updated UI

Module Data Auto Loads

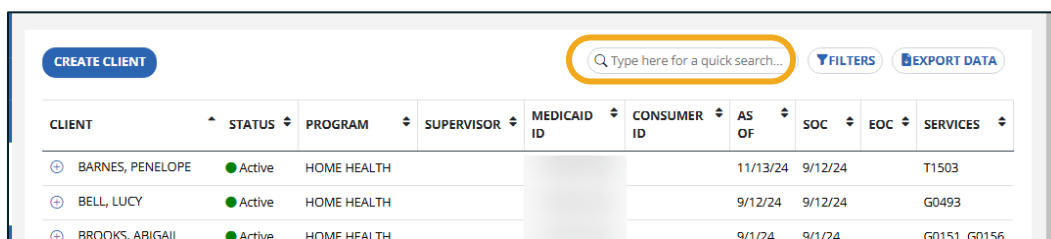
When you visit a module, the data for that module automatically loads. Previously users had to search first to see data for that module. This feature is implemented in the following modules: Clients, Employees, Schedules, Visit Maintenance, and Security.



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.

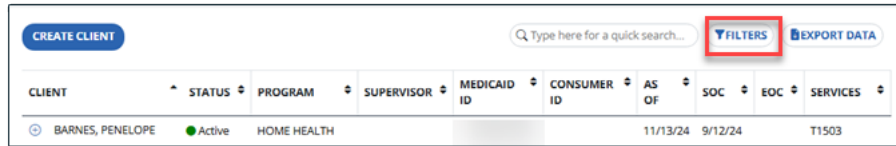


Quick Search Field

While the quick search helps you find a client fast, the **FILTERS** feature allows you to search by several 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.



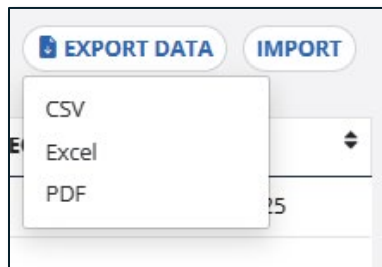
Location of Filters Button on Page

New Modules: Client and Employee Management

Access the Client Management module via Clients > Client Management, and the Employee Management module via Employees > Employee Management. The Data Entry option has been removed.

Export Data

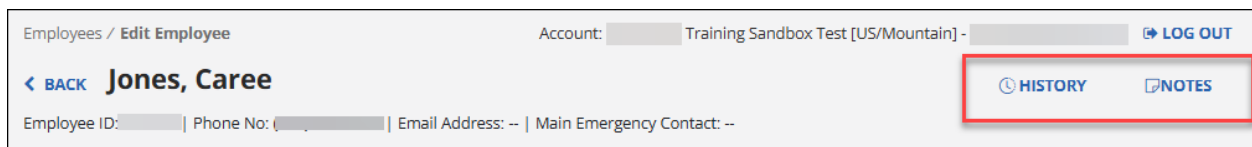
The Export Data feature is a popular reporting tool and has a new look. In the modules with this feature, once the filters are selected users can choose **Export Data** and choose the type of file to produce a report based on the filtered criteria.



Export Data Dropdown

New History and Notes Features

In the Client and Employee modules, admins and users with permission can see the Updates History and can view or enter Task Notes.



History and Notes Buttons

The Knowledge Center Replaces the Online Manual

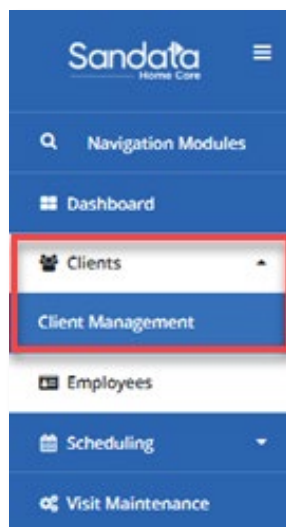
The in-portal Sandata EVV Knowledge Center links to always current Sandata On-Demand help pages and release notes.



EVV Knowledge Center

Client Module

In the navigation menu, “Data Entry” has been removed from the menu. You will use the arrow on Clients, then select Client Management to go to the Client Module.



Client Management in Menu

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.

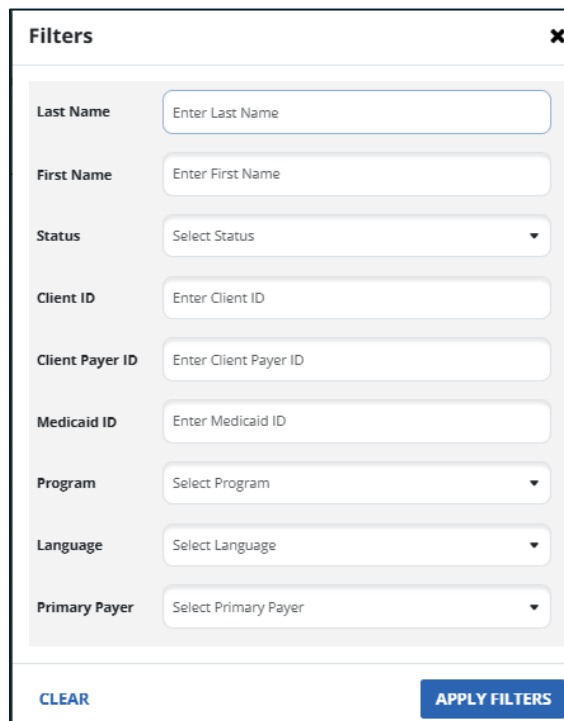


The screenshot shows a header bar with a 'CREATE CLIENT' button on the left. In the center is a search bar with the placeholder text 'Type here for a quick search...'. To the right of the search bar are two buttons: 'FILTERS' and 'EXPORT DATA'. Below the header bar is a table with the following columns: CLIENT, STATUS, PROGRAM, SUPERVISOR, MEDICAID ID, CONSUMER ID, AS OF, SOC, EOC, and SERVICES. Each column header has a small downward arrow icon next to it.

Quick Search Field in Client Management

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.



The screenshot shows a 'Filters' modal window with a close button (X) in the top right corner. The modal contains the following fields: 'Last Name' (text input with placeholder 'Enter Last Name'), 'First Name' (text input with placeholder 'Enter First Name'), 'Status' (dropdown menu with 'Select Status'), 'Client ID' (text input with placeholder 'Enter Client ID'), 'Client Payer ID' (text input with placeholder 'Enter Client Payer ID'), 'Medicaid ID' (text input with placeholder 'Enter Medicaid ID'), 'Program' (dropdown menu with 'Select Program'), 'Language' (dropdown menu with 'Select Language'), and 'Primary Payer' (dropdown menu with 'Select Primary Payer'). At the bottom of the modal are two buttons: 'CLEAR' and 'APPLY FILTERS'.

Client Search Filters

Client Details

Selecting a client will take you to the Edit Client page. Their name and program status are 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). **Clients will come into the system as Pending and will need to be made Active using the drop-down menu.**

The screenshot shows the 'Edit Client' page for a client named Gail Glowing. The page is divided into several sections:

- Header:** Displays the client's name 'Glowing, Gail' and a status dropdown menu set to 'Active'. Below this, a line of text shows 'Client ID: 714949 | Medicaid ID: 454455 | Main Address: 888 Back St | Phone No: -- | Main Emergency Contact: --'. Navigation links for 'HISTORY' and 'NOTES' are also present.
- Left Sidebar:** Contains a navigation menu with options like Dashboard, Clients, Employees, Scheduling, Visit Maintenance, Billing, Reports, Security, Fixed Visit Verification, and Online Manual.
- Tabbed Interface:** The 'Personal' tab is selected, showing fields for Identifiers (Client ID, Medicaid ID, SSN, Agency ID) and Personal Information (Client Name, Date of Birth, Gender, Language).
- Addresses and Phone Numbers:** A section at the bottom shows the current address '888 Back St' and a 'REQUEST DEVICE' button.
- Contacts:** A section on the right indicates 'No contact added. Add one main contact.' with an 'ADD CONTACT' button.

Edit Client Screen with Name and Essential Details at the Top

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

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 are now done in the client module.

Clients / Edit Client

Account: 60145 [US/M]

< BACK

DM | Active

Client ID: 714949 | Medicaid ID: 454455 | Main Address: -- | Phone No: -- | Main Emergency Contact: --

Personal

Program

Schedules

Indiana - HOME VISIT NOS/HHA - INCRS - 02/01/2024 - Authorized

Active

Program Details

Supervisor: -

Enrollment: -

Created Date: 02/01/2024

Effective Date: 02/14/2024

SOC Date: 02/01/2024

EOC Date: -

Eligibility Begin Date: -

Eligibility End Date: -

Reason For Change: -

ADD PAYER

Payer Details

Payer Name: INCRS

Bill Rate: Default

Client Payer ID: -

Start Date: -

Medicaid ID: 0011223344

Rank: 1

Group Number: -

End Date: -

Voiced Auth.

Expired Auth.

ADD AUTHORIZATION

Authorization Details

Payer: INCRS

Service: 99600

Event Code: NONE- Default

Start Date: 01/01/2024

Comment: -

Authorization No: EVV-1087177

Modifiers: -

Format: Hours

End Date: 12/31/2070

Service Details

ADD SERVICE

Service Name: HOME VISIT NOS/HHA

Code: 99600

Start Date: 01/01/2024

End Date: -

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. After creating a client in the sytem, be sure to change their status to Active.

New Client

**Required*

Last Name*

Test

First Name*

Test

Program*

AHCCCS

Payer*

AZACH

Medicaid ID*

6546487654654

SSN

__-__-__

Phone

() __-__

[CANCEL](#)

CREATE CLIENT

New Client Form

Employee Module

In the navigation menu, “Data Entry” has been removed from the menu. 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 an employee by name.

Employees

Account: [REDACTED]

CREATE EMPLOYEE

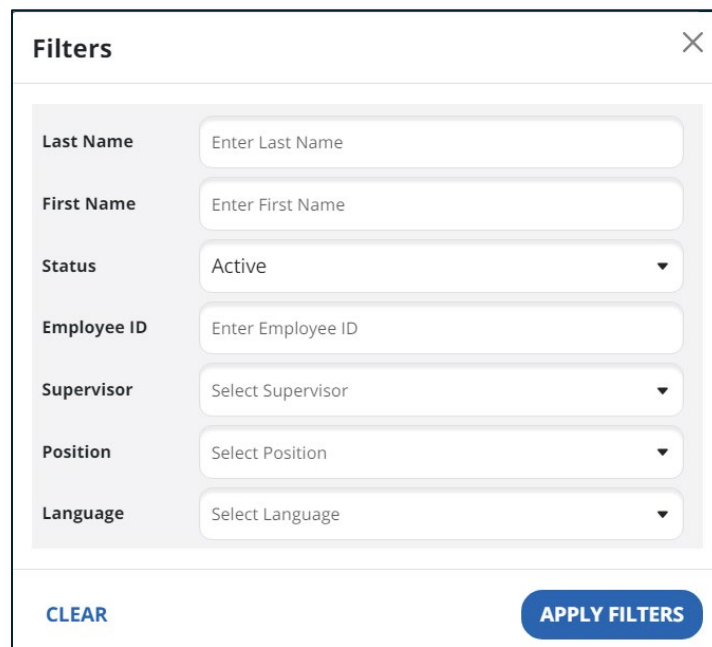
Q Sunny

FILTERS

NAME	STATUS	EMPLOYEE ID	POSITION	HIRED DATE	RELEASED DATE
Day, Sunny	● Active	688502	CGV - Caregiver	08/07/2024	

Quick Search in Employee Module

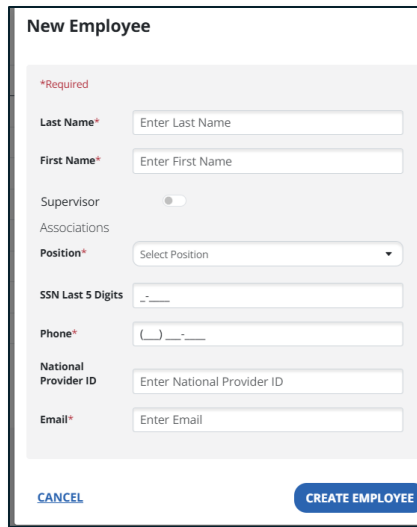
Like the Client module, the Employee module also features the easy-to-use advanced Filters that provide the following search fields beyond name: Status, Employee ID, Supervisor, Position, and Language. The default view will be for Employees that are in Active status.

A screenshot of the 'Filters' window in the Employee module. The window has a title bar with 'Filters' and a close button (X). It contains a list of filter fields: 'Last Name' (text input), 'First Name' (text input), 'Status' (dropdown menu with 'Active' selected), 'Employee ID' (text input), 'Supervisor' (dropdown menu with 'Select Supervisor' selected), 'Position' (dropdown menu with 'Select Position' selected), and 'Language' (dropdown menu with 'Select Language' selected). At the bottom, there are two buttons: 'CLEAR' and 'APPLY FILTERS'.

Employee Filters Window

Create Employee

An easy to use New Employee pop-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.



New Employee

**Required*

Last Name*

First Name*

Supervisor ☐

Associations

Position*

SSN Last 5 Digits

Phone*

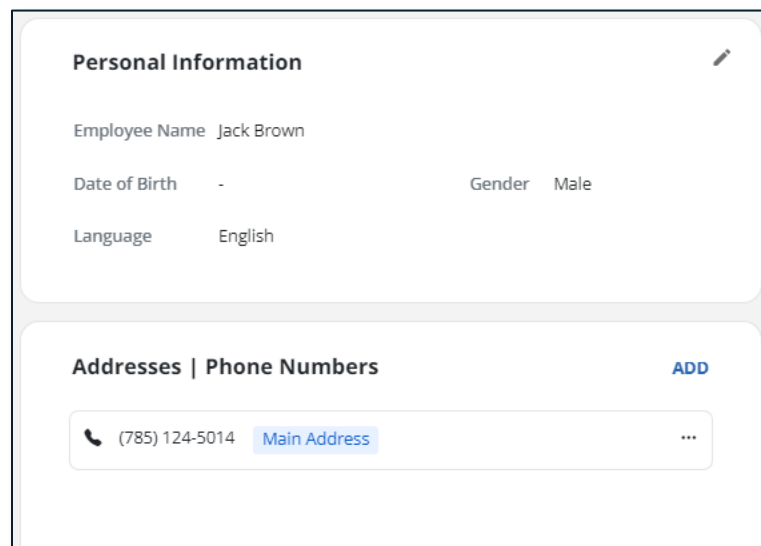
National Provider ID


Email*

[CANCEL](#) [CREATE EMPLOYEE](#)

Create New Employee Window

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.




Personal Information 

Employee Name Jack Brown

Date of Birth - Gender Male

Language English

Addresses | Phone Numbers [ADD](#)

 (785) 124-5014 [Main Address](#) [...](#)

Addresses and Phone Numbers Tile

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.

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*
(785) 124-5014

Email Address*
Enter Email Address

The Email address is required.

☒ Use as main address

☒ Mobile user

+ Add number

CANCEL RESET MOBILE USER PASSWORD SAVE

Edit Employee Address and Phone Number

Sandata Home Care

Employees / Edit Employee

Account: 60145 [US/Mountain] - santrax LOG OUT

< BACK **Day, Sunny** HISTORY NOTES

Employee ID: 688502 | Phone No: (772) 237-9618 | Email Address: -- | Main Emergency Contact: --

Personal Schedules

Identifiers

SSN *****

Status Active Effective Date Aug 7, 2024

Employee ID/PIN 688502 Position CGV- Caregiver

Hire Date Aug 7, 2024 Supervisor -

Supervisor Code - National Provider ID -

Alternative Provider ID 688502 Registry ID -

Contacts

No contact added.
Add one main contact.

ADD CONTACT

Navigation Modules

Dashboard

Clients

Employees

Scheduling

Visit Maintenance

Billing

Reports

Security

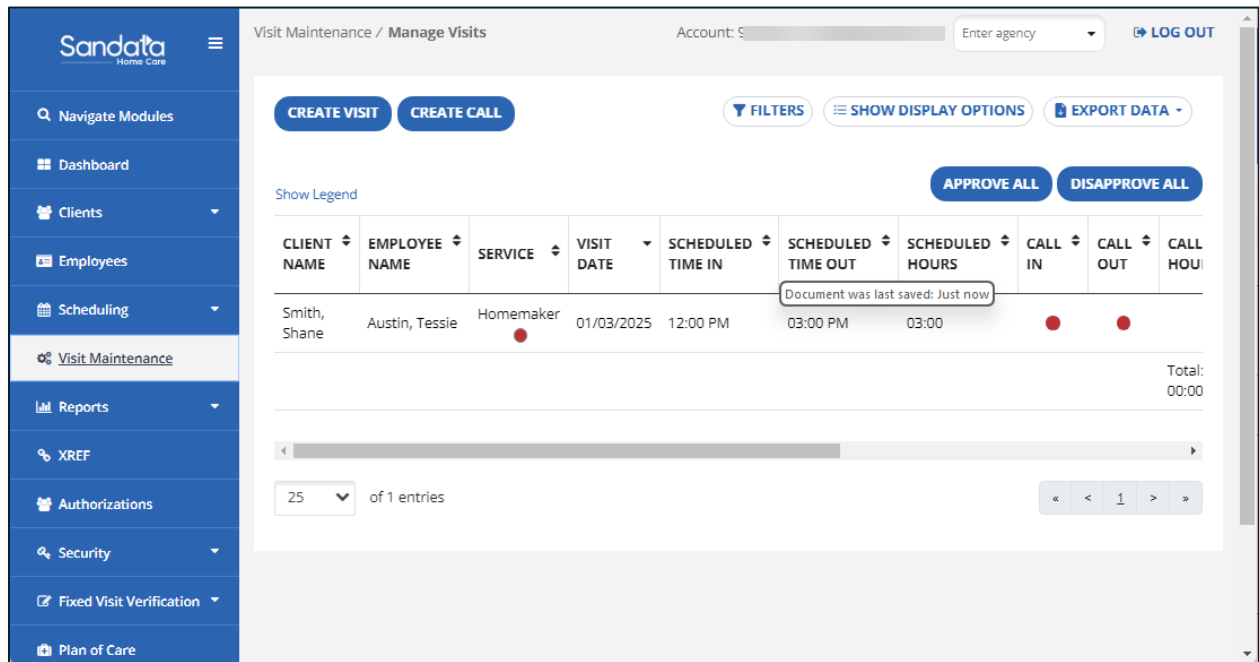
Fixed Visit Verification

Online Manual

Employee View with Personal Identifiers and Contacts

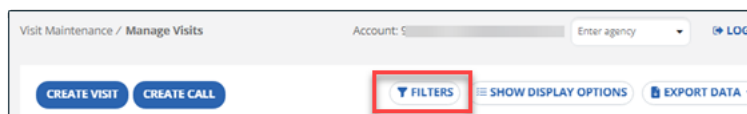
Visit Maintenance

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.



Easy-to-use Visit Search

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



Filters Button in Visit Maintenance

Filters

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

Group Visit Code

Select Group Visit Code

CLEAR

RESET

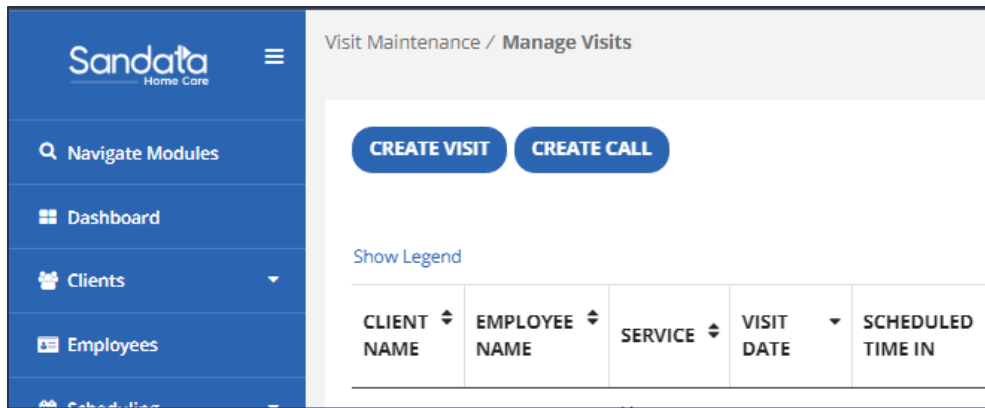
APPLY FILTERS

SAVE SETTINGS

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 missing.



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.

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.

CREATE VISIT

CREATE CALL

FILTERS

SHOW DISPLAY OPTIONS

EXPORT DATA

Show Legend

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		

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. Users can also use the Pencil under Actions to edit the Visit details. In the image below, clicking on the missing call in dot takes the user to the Call Log tab.

The screenshot displays the 'Visit Details' screen in a web application. At the top, there's a header with 'Visit Maintenance / Visit Details', an 'Account' dropdown, and an 'Enter agency' dropdown. Below this is a navigation bar with a '< BACK' link and 'Visit From Date: 11/11/2024'. The main content area shows client and employee information: 'Client ID: 317139 | Client Name: [redacted] | Medicaid ID: 234245 | Employee ID: 121708 | Employee Name: Fong, Alyssa'. A horizontal tab bar is visible, with 'Call Log' highlighted in blue and underlined. Other tabs include 'General', 'Client', 'Employee', 'Merge Calls', 'Tasks', 'Exceptions', 'GPS', 'Memo', 'Claims', and 'History'. Below the tabs, there are two main sections. The first section is titled 'Add Manual Call' and 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), and 'Time Zone' (a dropdown menu). The second section contains a 'Reason Code *' dropdown menu and a 'Reason Note' text input field. A blue 'SAVE' button is located at the bottom right of the second section. Red asterisks and error messages like '* indicates required field' and 'Reason Code is required.' are present.

Tabs in Visit Details Screen

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.

[BACK](#)
Visit From Date: 10/08/2024

Client ID: 952340 | Client Name: Ball, Foot | Medicaid ID: 234246 | Employee ID: 208714 | Employee Name: Tester, Joe

General
Client
Employee
Call Log
Merge Calls
Tasks
Exceptions
GPS
Memo
Claims
History

Exceptions

☐ SELECT ALL

Location Required

☐ ACKNOWLEDGE THIS EXCEPTION

Visits Without Out-Calls

This exception needs to be fixed

ADD REASON CODE

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

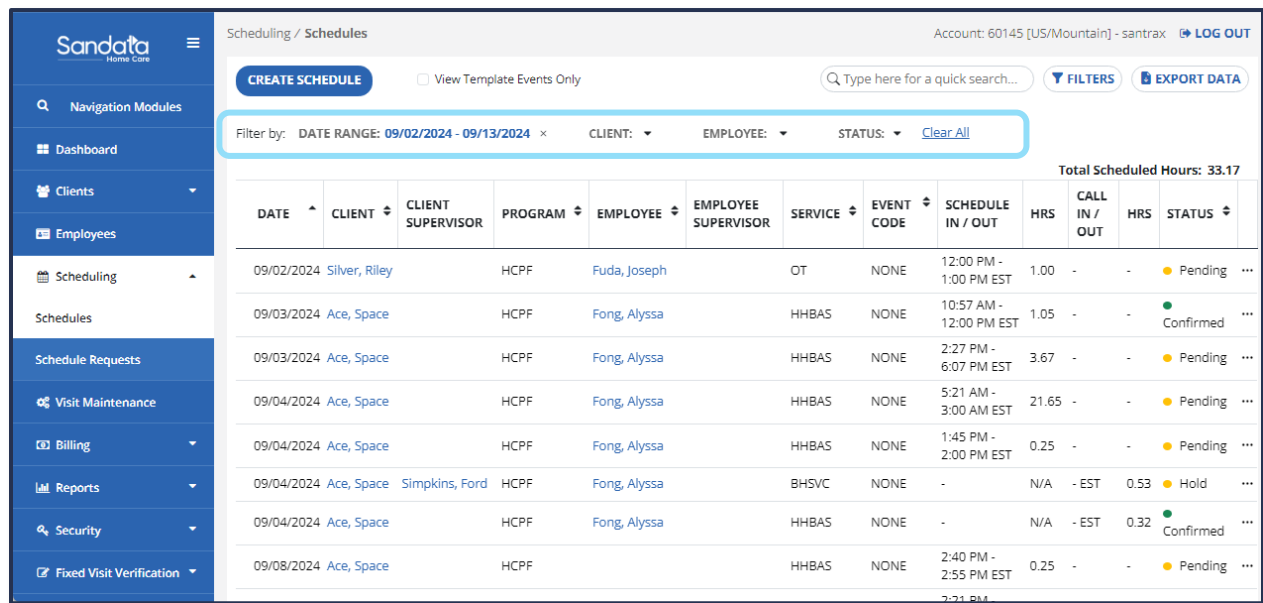
CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	VISIT STATUS	UNITS
Client, Mountain Time	Dunham, Sean	Durable Medical Equipment	10/28/2024				01:00 AM	01:30 AM	00:30	Incomplete	
Client, Mountain Time	Fong, Alyssa	Home Health - 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	

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 displays the Sandata Scheduling module interface. On the left is a sidebar with navigation modules: Dashboard, Clients, Employees, Scheduling (selected), Schedules, Schedule Requests, Visit Maintenance, Billing, Reports, Security, and Fixed Visit Verification. The main content area is titled 'Scheduling / Schedules' and shows account information 'Account: 60145 [US/Mountain] - santrax' and a 'LOG OUT' link. Below the title bar, there's a 'CREATE SCHEDULE' button and a checkbox for 'View Template Events Only'. A search bar prompts 'Type here for a quick search...'. Filter buttons for 'FILTERS' and 'EXPORT DATA' are present. A filter bar shows 'Filter by: DATE RANGE: 09/02/2024 - 09/13/2024 x CLIENT: EMPLOYEE: STATUS: Clear All'. The table below lists scheduled visits with columns: DATE, CLIENT, CLIENT SUPERVISOR, PROGRAM, EMPLOYEE, EMPLOYEE SUPERVISOR, SERVICE, EVENT CODE, SCHEDULE IN / OUT, HRS, CALL IN / OUT, HRS, STATUS, and a menu icon. The total scheduled hours are 33.17.

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		HHBAS	NONE	10:57 AM - 12:00 PM EST	1.05	-	-	Confirmed
09/03/2024	Ace, Space		HCPF	Fong, Alyssa		HHBAS	NONE	2:27 PM - 6:07 PM EST	3.67	-	-	Pending
09/04/2024	Ace, Space		HCPF	Fong, Alyssa		HHBAS	NONE	5:21 AM - 3:00 AM EST	21.65	-	-	Pending
09/04/2024	Ace, Space		HCPF	Fong, Alyssa		HHBAS	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		HHBAS	NONE	-	N/A	- EST	0.32	Confirmed
09/08/2024	Ace, Space		HCPF			HHBAS	NONE	2:40 PM - 2:55 PM EST	0.25	-	-	Pending

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.

Filters

Client

Type 2 letters of the Client's name

Program

Select Program

From Date

12/30/2024

To Date

01/10/2025

From Time

--:-- --

To Time

--:-- --

Employee

Type 2 letters of the Employee's name

Schedule Status

Select Schedule Status

Exception

Select Exception

Supervisor
(Employee Or Client)

Select Supervisor (Employee Or Client)

Primary Payer

Select Primary Payer

Position

Select Position

Service

Select Service

Event Code

Select Event Code

Payer Number

Enter Payer Number

Medicaid ID

Enter Medicaid ID

Authorization Number

Enter Authorization Number

EVV Call

Schedules with no employee assigned

Hide Cancelled Schedules

CLEAR

APPLY FILTERS

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.

Create Schedule

* Required

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

[CANCEL](#)

[CREATE PREVIEW](#)

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.

Repeat Event

Repeat every 1 Week(s)

Repeat On
Mo Tu We Th Fr Sa Su

Ends
☐ On mm/dd/yyyy

☒ After 7 event(s)

[CANCEL](#)

[DONE](#)

Repeat Event Window

Users can now preview the schedule details before saving and adding them 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.

Preview

Check the events in Preview to proceed with schedule creation.

Schedule Details

📅 Friday, September 6, 2024 - Wednesday, September 18, 2024
🕒 7:00 AM - 12:00 PM (5h)
Repeating event(s): 6

Scheduled events

<input type="checkbox"/>	Events (6)	
<input type="checkbox"/>	Friday, September 6, 2024	Reschedule
<input type="checkbox"/>	Monday, September 9, 2024	Reschedule
<input type="checkbox"/>	Wednesday, September 11, 2024	Reschedule
<input type="checkbox"/>	Friday, September 13, 2024	Reschedule
<input type="checkbox"/>	Monday, September 16, 2024	Reschedule
<input type="checkbox"/>	Wednesday, September 18, 2024	Reschedule

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.

Preview

Check the events in Preview to proceed with schedule creation.

Schedule Details

Friday, January 24, 2025 - Friday, January 24, 2025

7:00 AM - 8:00 AM (1h)

234 Central Street, Acton, MA, 01720-0000

Main

Home

Repeating event(s): 1

Scheduled events

☐

Events (1)

☐

Main

Home

Friday, January 24, 2025

Hide conflicts (1)

Authorization Violations

Resolve

Schedule Preview Window with Conflicts

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

Preview

Check the events in Preview to proceed with schedule creation.

Schedule Details

Friday, January 24, 2025 - Friday, January 24, 2025

7:00 AM - 8:00 AM (1h)

234 Central Street, Acton, MA, 01720-0000

Main

Home

Repeating event(s): 1

Scheduled events

☒

Events (1)

CHANGE EMPLOYEE

Override

☒

Main

Home

Friday, January 24, 2025

Hide conflicts (1)

Authorization Violations

Resolve

Sandata

| EVV Only Enhanced New UI Crosswalk - DRAFT | 25

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.

Scheduling / Schedules

Account:

CREATE SCHEDULE

☐ View Template Events Only

Type here for a quick search...

FILTERS

Filter by: DATE RANGE: 01/20/2025 - 01/31/2025 × CLIENT: EMPLOYEE: STATUS:

Total Sched

EDIT EVENTS (1) 1 selected

<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, PENELOPE		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	

Edit Schedules Window

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

Edit Events (1)
×

Edit information for selected (1) events.

Replace Employee With
☐ None

Replace Client With

Replace Service with

Select

Replace Event Code With

Select

Change Status To

Select

Change Schedule In/Out To

Start Time

--:--

⌚

End Time

--:--

⌚

Replace Bill By With

Select

Replace Pay By With

Select

CANCEL

SAVE CHANGES

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.

Schedule Bulk Edit Validation (on 1)
×

Summary

Authorization Violations	0
Time Conflicts	0
Overtime Warnings	0

CANCEL

SAVE SCHEDULES (1)

Bulk Edit Schedule Confirmation

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.

Clients / **Edit Client**

[< BACK](#) **McPherson, James** HH- HOME HEALTH | Active

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

Personal Program **Schedules**

CREATE TEMPLATE

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...

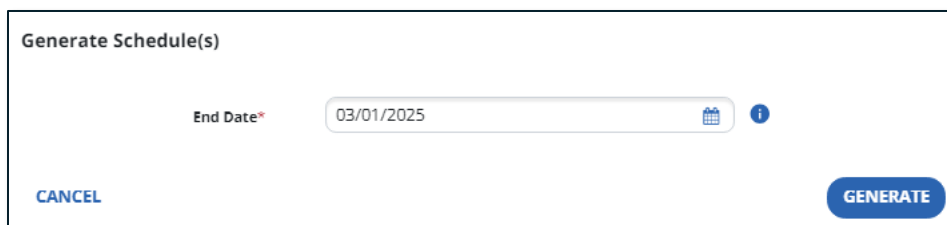
Comments
Write your comments here...

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

CANCEL **ADD EVENT**

Create Template Window

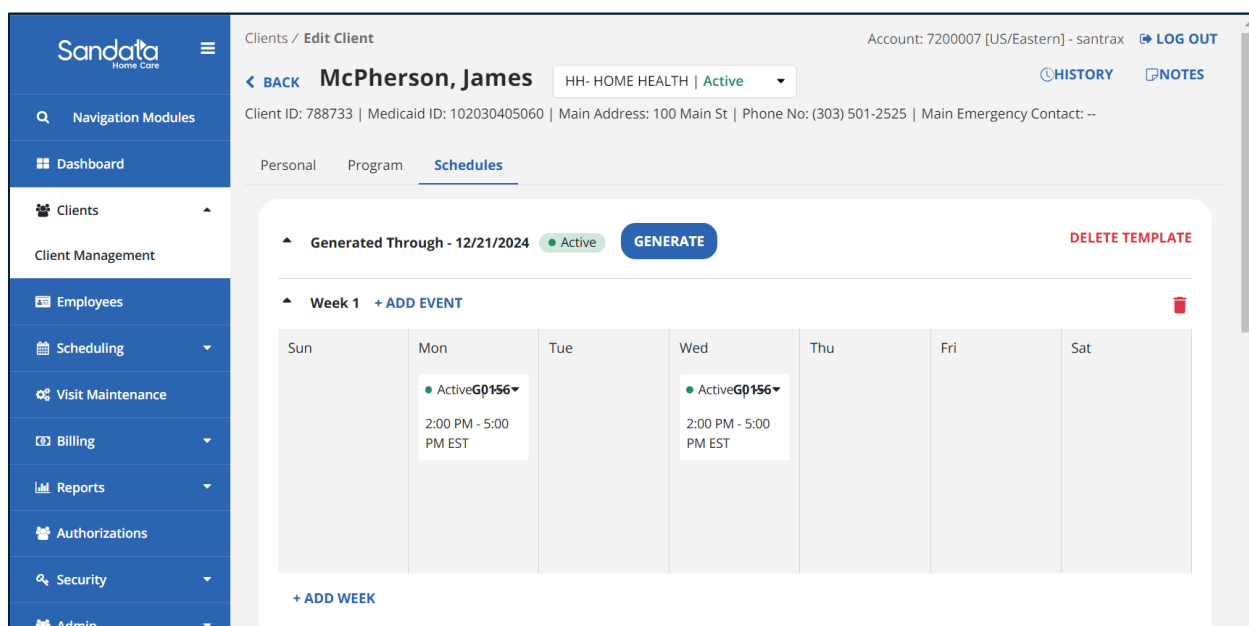
Once Add Event is selected, the user enters the end date in the pop-up window and selects Generate.



A pop-up window titled "Generate Schedule(s)". It contains a label "End Date*" followed by a date input field showing "03/01/2025". To the right of the input field are a calendar icon and an information icon. At the bottom left is a "CANCEL" button, and at the bottom right is a blue "GENERATE" button.

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.

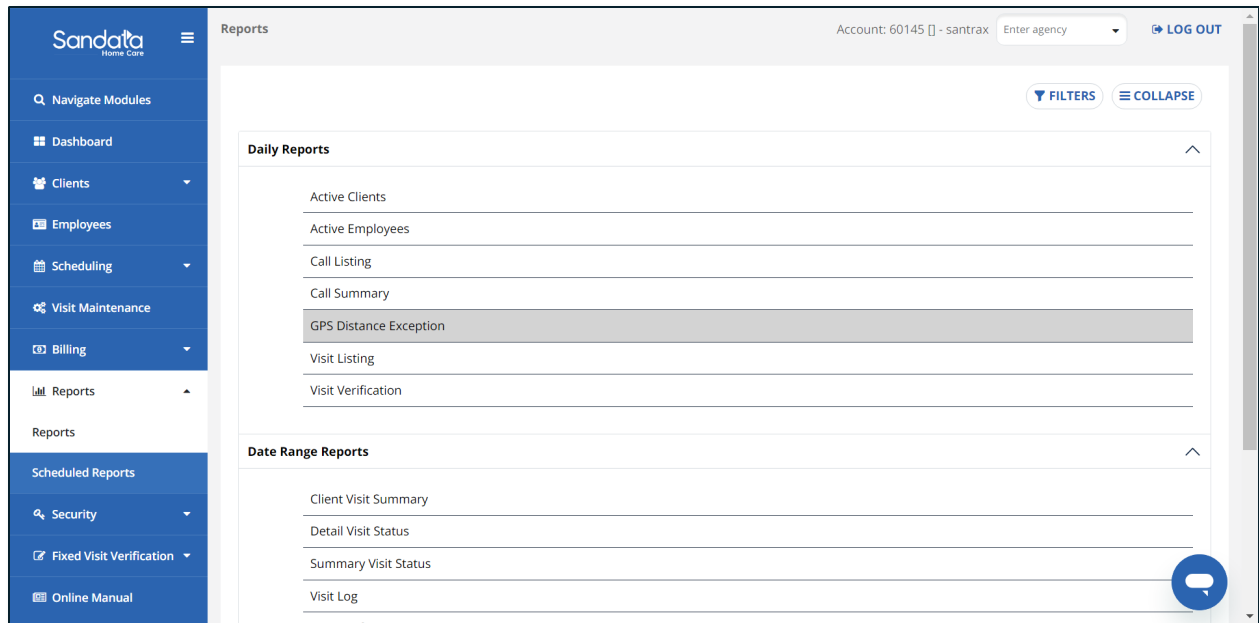


A screenshot of the Sandata Home Core interface showing the "Schedules" tab for a client named "McPherson, James". The interface includes a sidebar with navigation modules like Clients, Employees, Scheduling, Visit Maintenance, Billing, Reports, Authorizations, Security, and Admin. The main content area shows the client's details and a schedule grid. The schedule grid is titled "Generated Through - 12/21/2024" and "Active". It shows a weekly schedule for "Week 1" with events on Monday and Wednesday from 2:00 PM to 5:00 PM EST. The events are labeled "Active GP156". There are "GENERATE" and "DELETE TEMPLATE" buttons at the top right of the schedule grid.

Generated Schedule Template view

Reports

The Reports module has been updated so that report names are displayed 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.

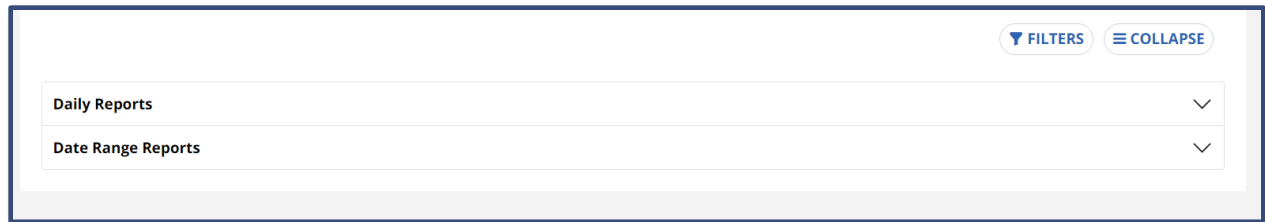


Reports Module List of Reports by Type and in Alphabetical Order

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.

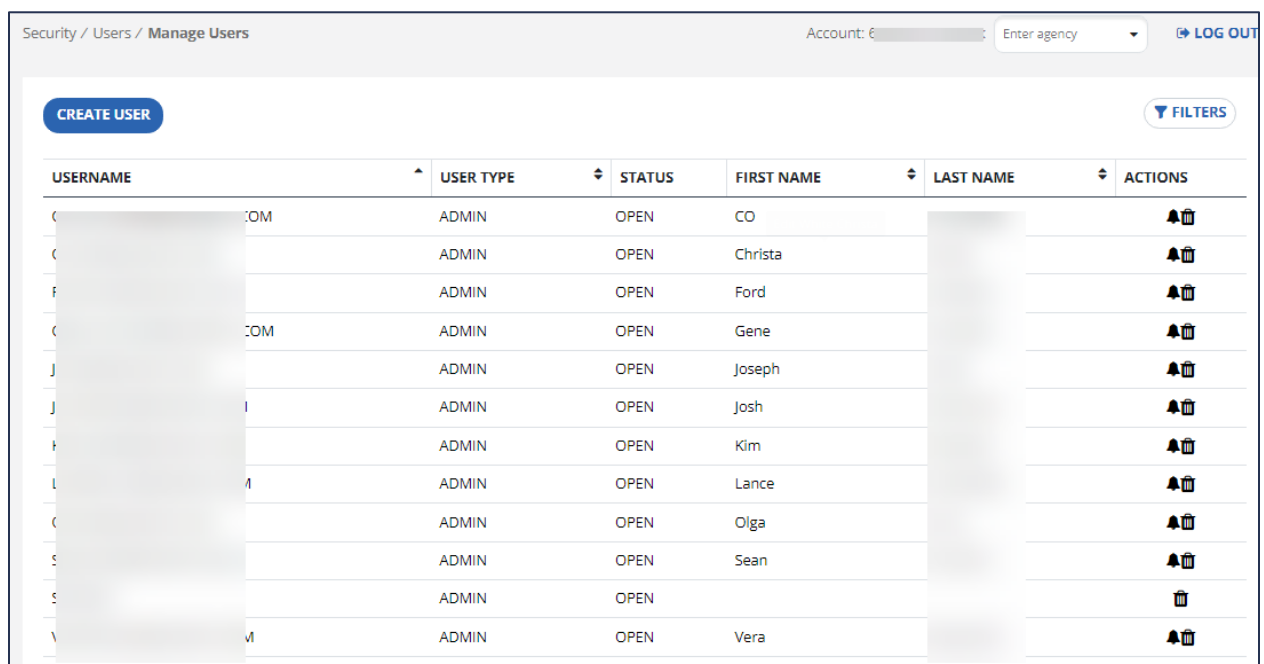


Reports Module in Collapsed View

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.



Manage Users View in Security Module