Sandata EVV Enhanced New UI Guide

May 25, 2025

Table of Contents

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.

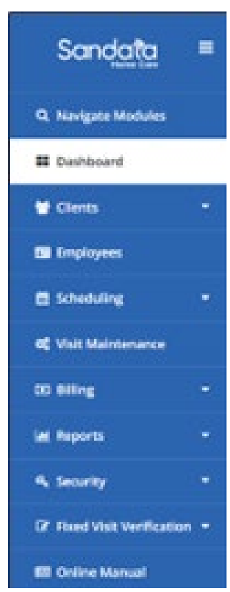
You'll discover the following in Sandata EVV Enhanced:

- 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

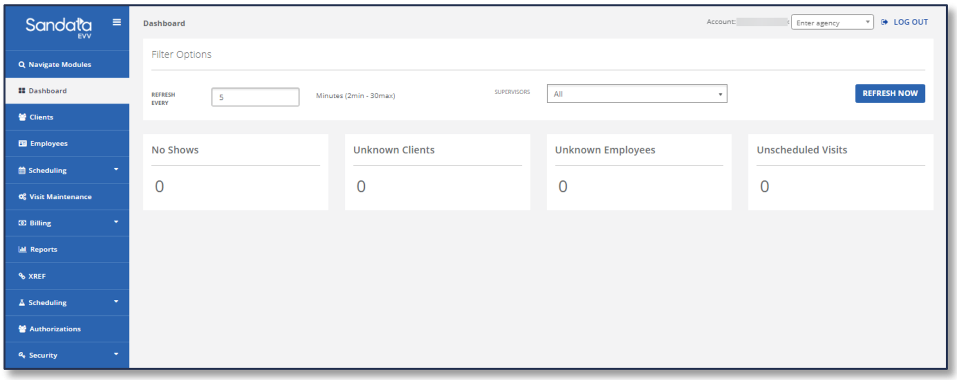
This document is intended for a general audience of Sandata EVV users and uses the Standard Configuration. Your state or payer may utilize a different configuration in the platform.

Navigation

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

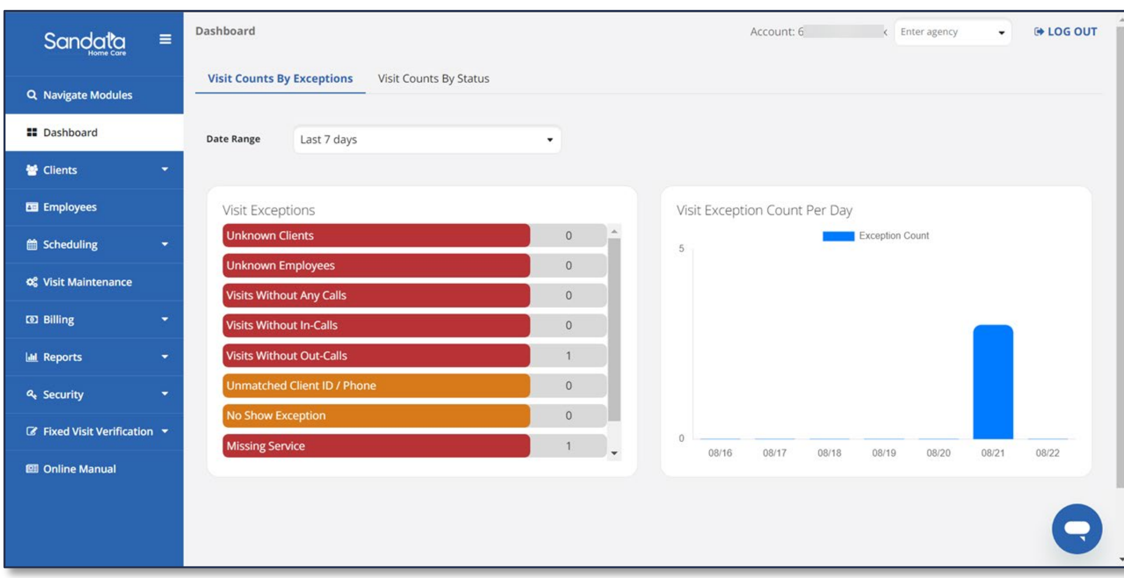


The Dashboard



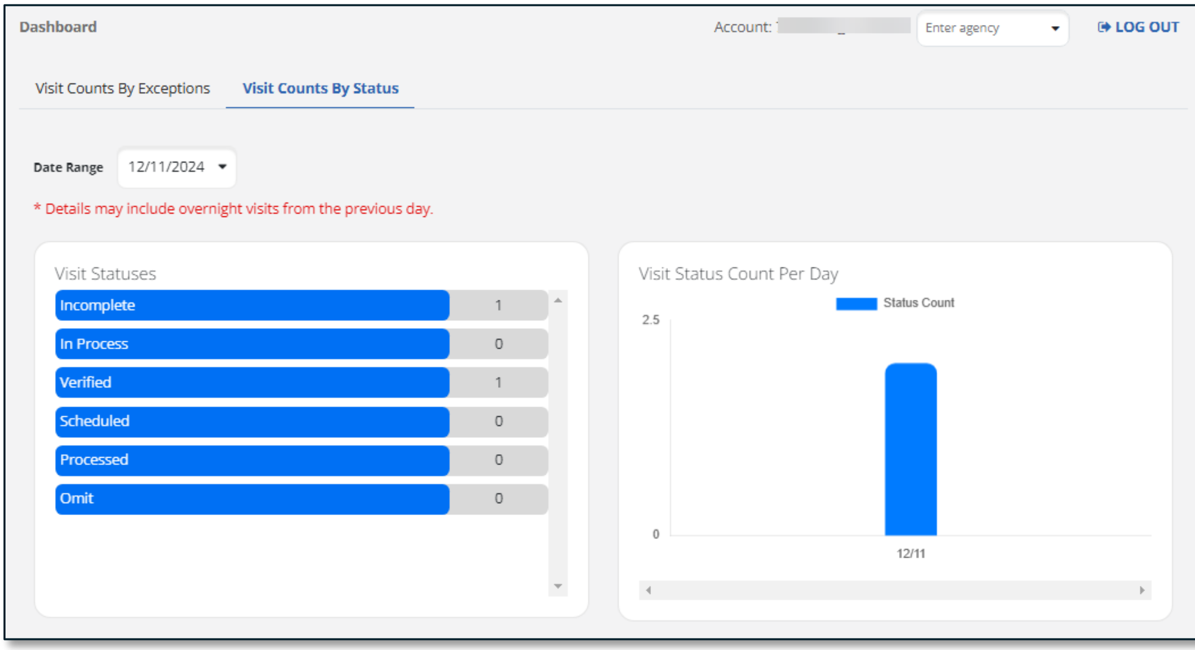
Former Dashboard

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.

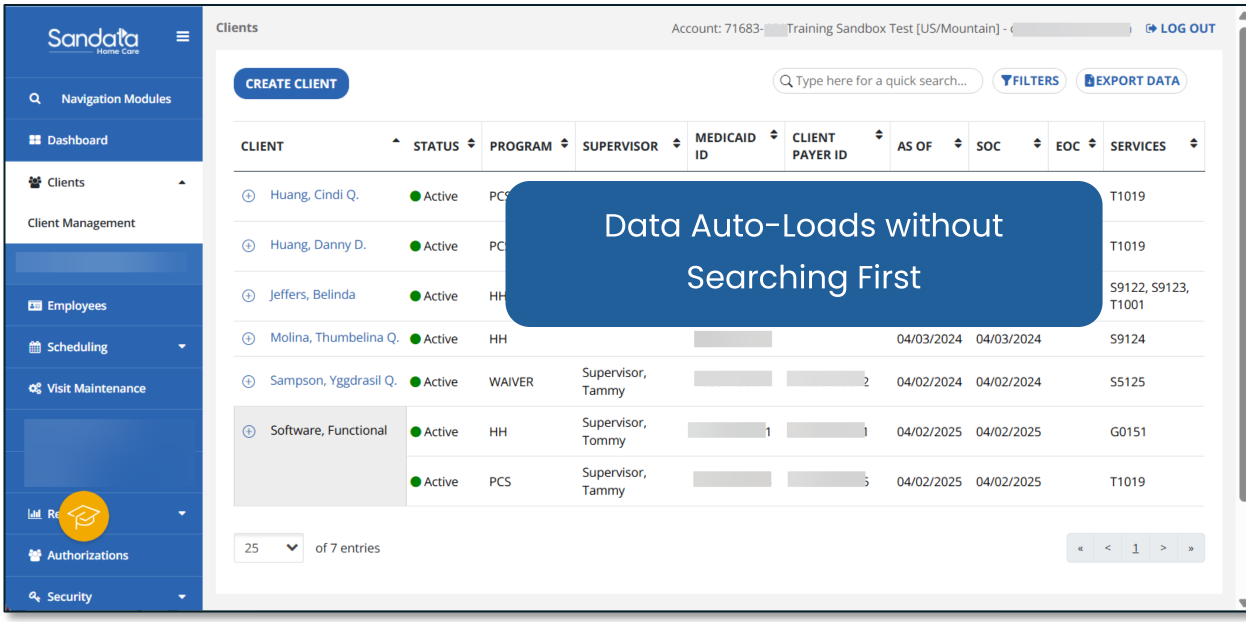


Visit Counts by Status Dashboard

Key Differences in the Updated UI

Module Data Auto Loads

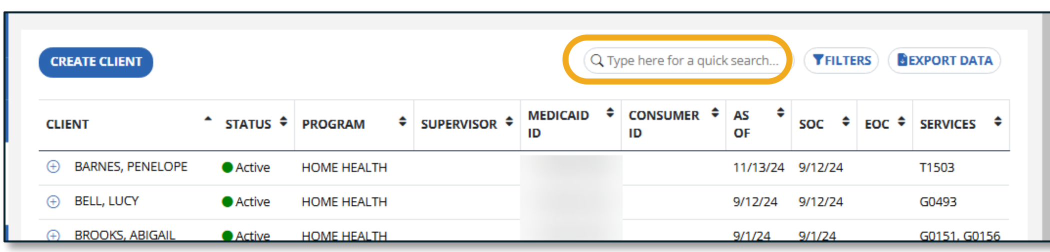
When you visit a module, the data for that module automatically loads. Previously users had to search first to see data for that module. This feature is implemented in the following modules: Clients, Employees, Schedules, Visit Maintenance, and Security.



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.

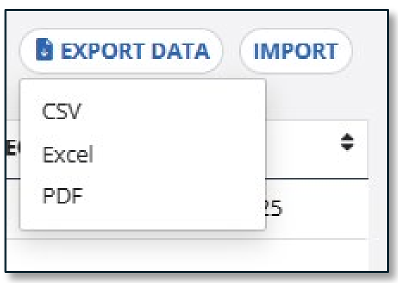
Location of Filters Button on Page

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

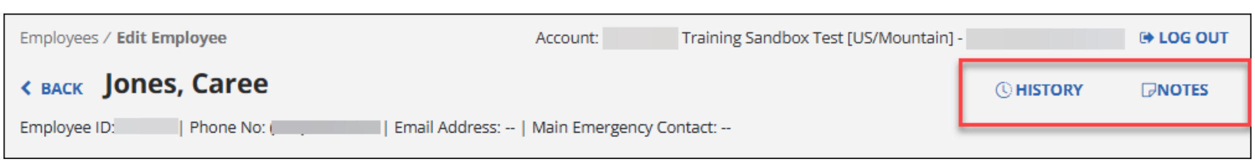
The Export Data feature is a popular reporting tool and has a new look. In the modules with this feature, once the filters are selected users can choose **Export Data** and choose the type of file to produce a report based on the filtered criteria.



Export Data Dropdown

New History and Notes Features

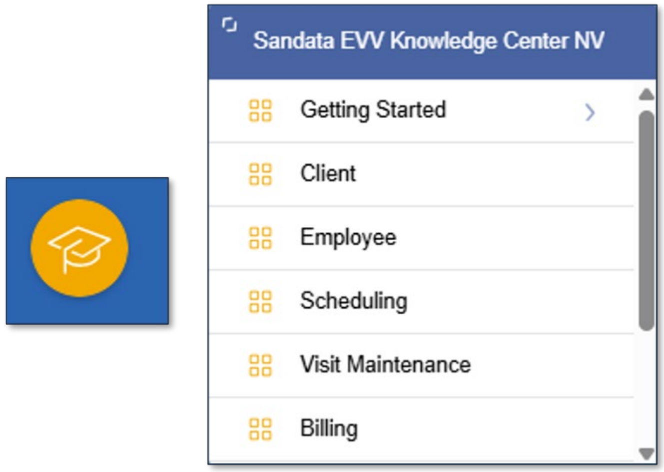
In the Client and Employee modules, admins and users with permission can see the Updates History and can view or enter Task Notes.



History and Notes Buttons

The Knowledge Center Replaces the Online Manual

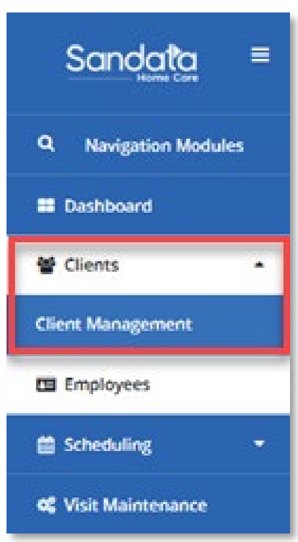
The in-portal Sandata EVV Knowledge Center links to always current Sandata On-Demand help pages and release notes.



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

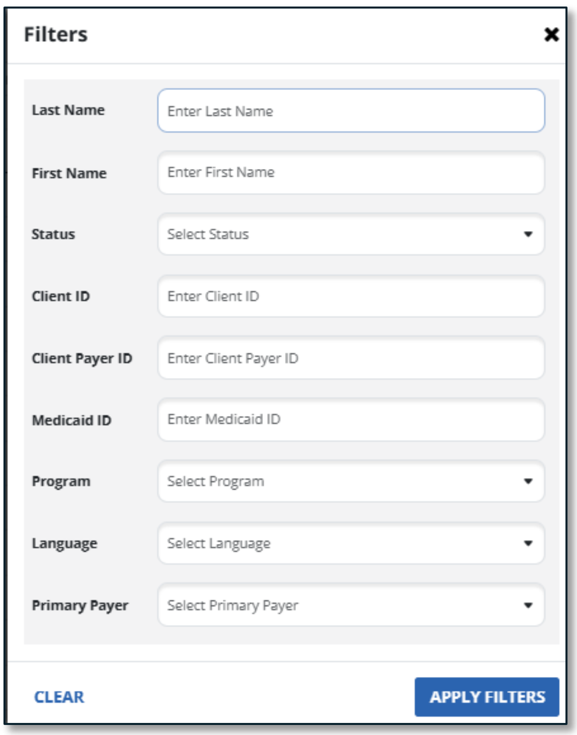
Users will see the list of Active clients in the system. No need to search first to view your list of active clients.

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

Quick Search Field in Client Management

Advanced filters

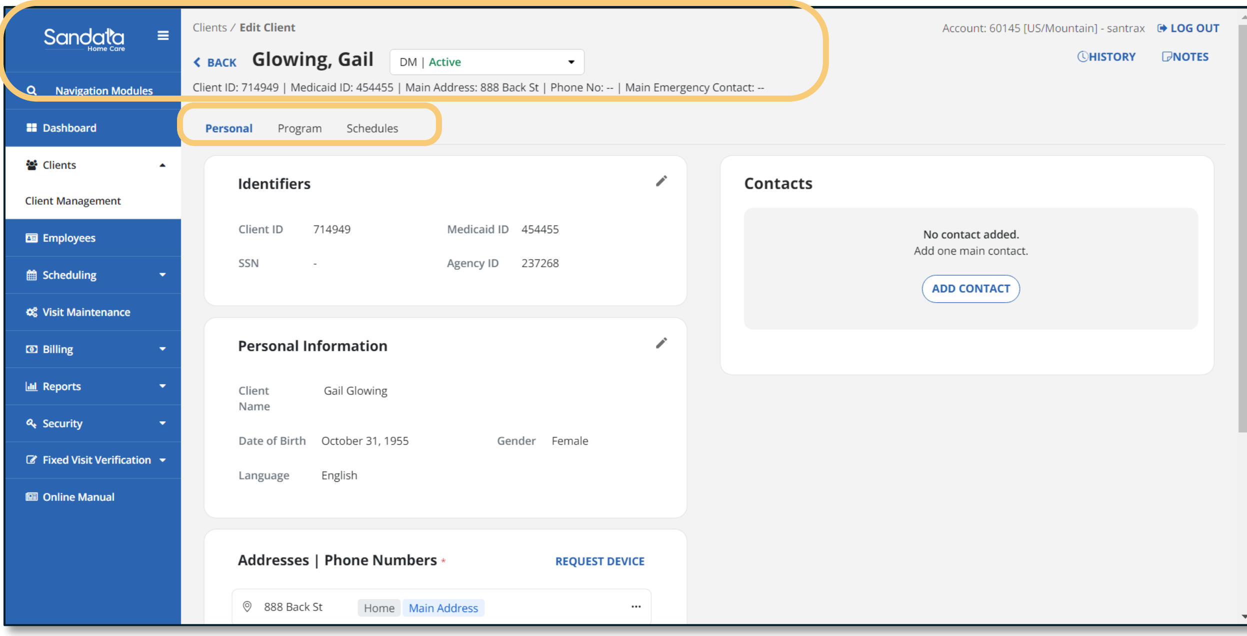
You can use the fields in the enhanced Filters to view lists of clients. For example, you can search by client status (Active, Pending, or Inactive), and by Program and by Payer, among other search fields.



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.**

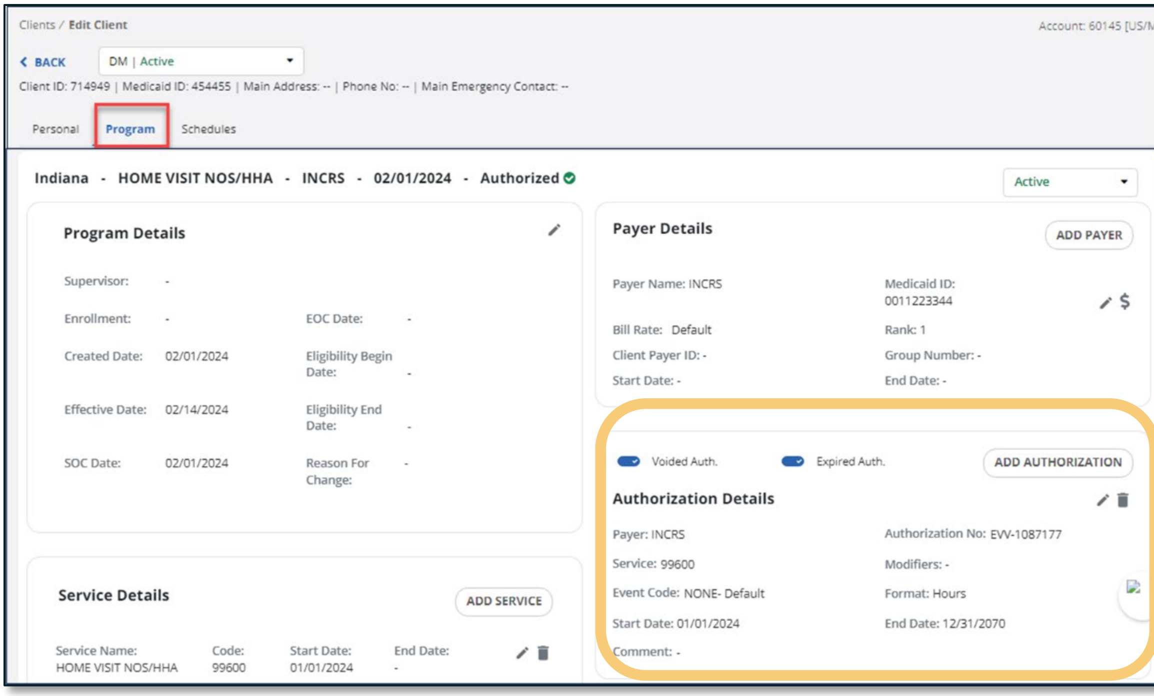


Edit Client Screen with Name and Essential Details at the Top

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

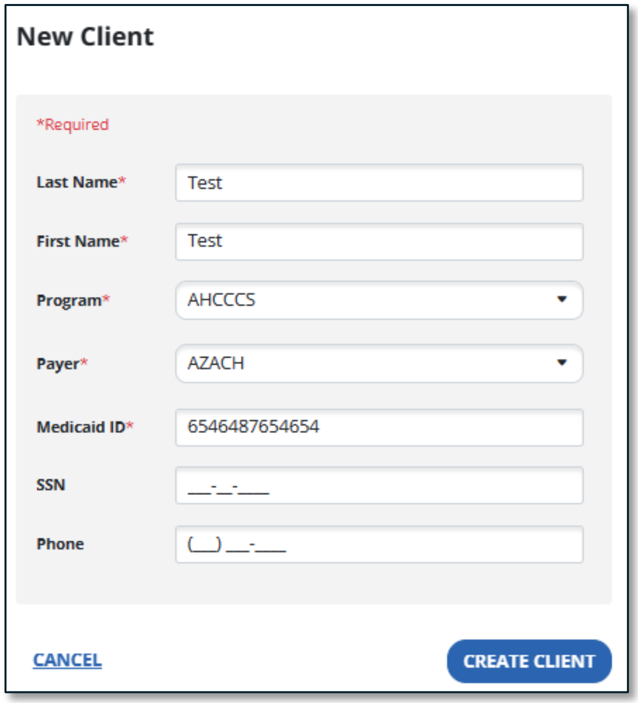
Program, Service, and Payer details are now easy to view and edit in the Program tab. Notice that Authorizations Details are now available for viewing and editing in the program tab. No need to navigate to a separate module! Adding and editing authorizations are now done in the client module.



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

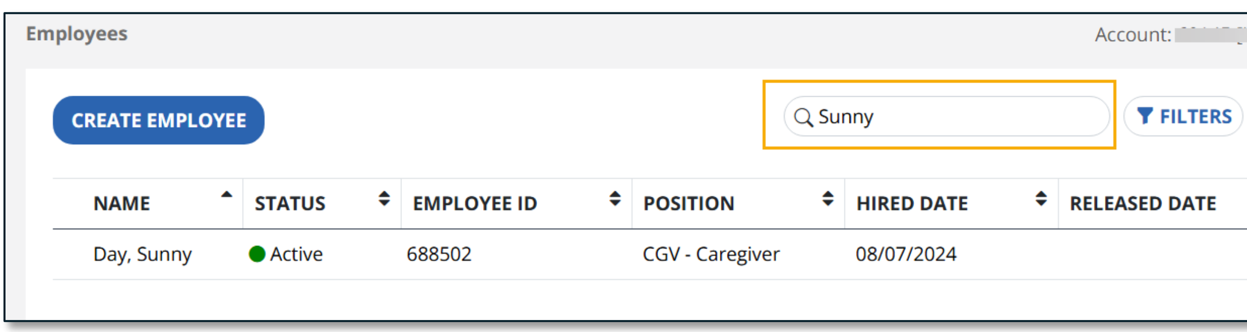


New Client Form

Employee Module

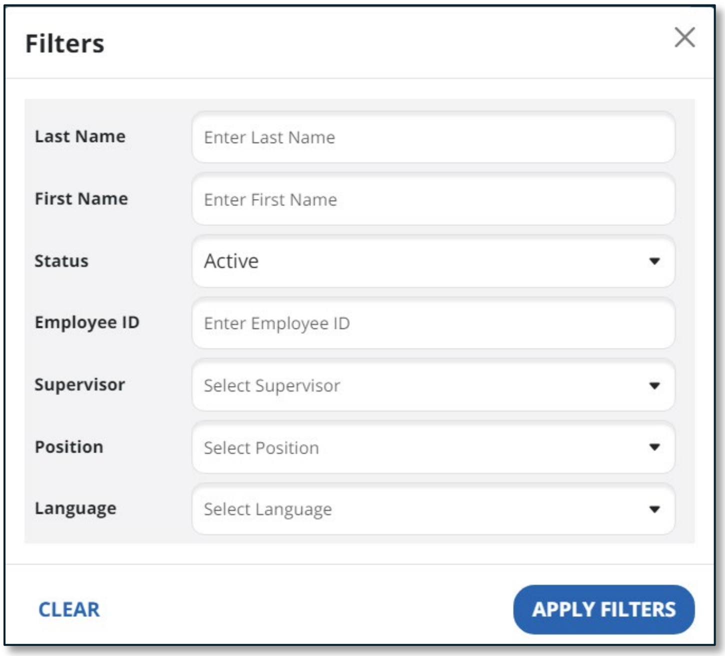
In the navigation menu, "Data Entry" has been removed from the menu. Like in the Client module, Employees will automatically load when users land on the Employee Module. The current default view is for Active Employees.

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



Quick Search in Employee Module

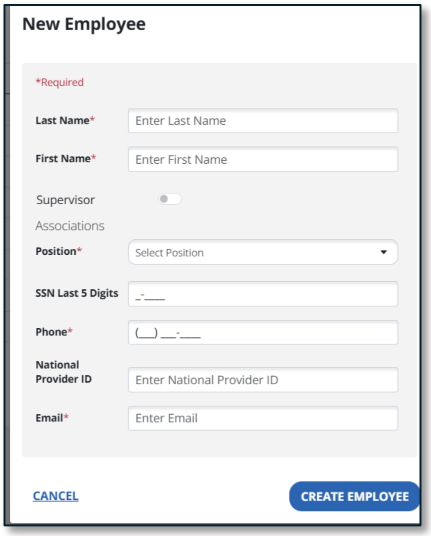
Like the Client module, the Employee module also features the easy-to-use advanced Filters that provide the following search fields beyond name: Status, Employee ID, Supervisor, Position, and Language. The default view will be for Employees that are in Active status.



Employee Filters Window

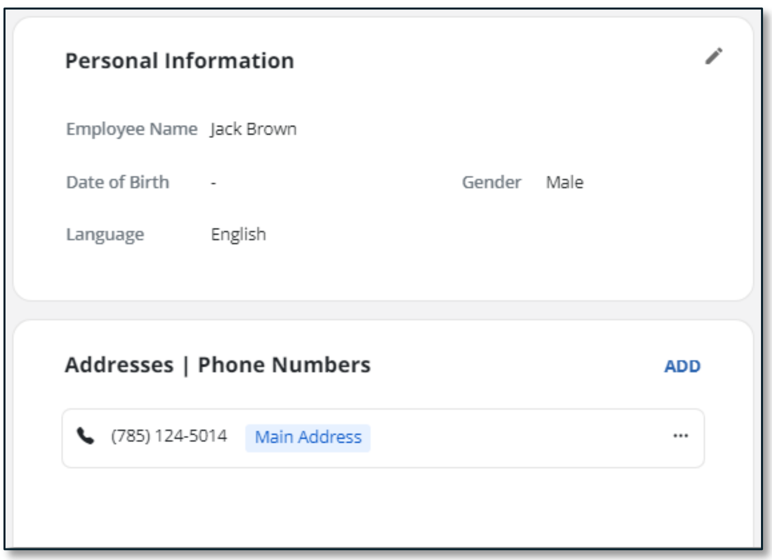
Create Employee

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.



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.

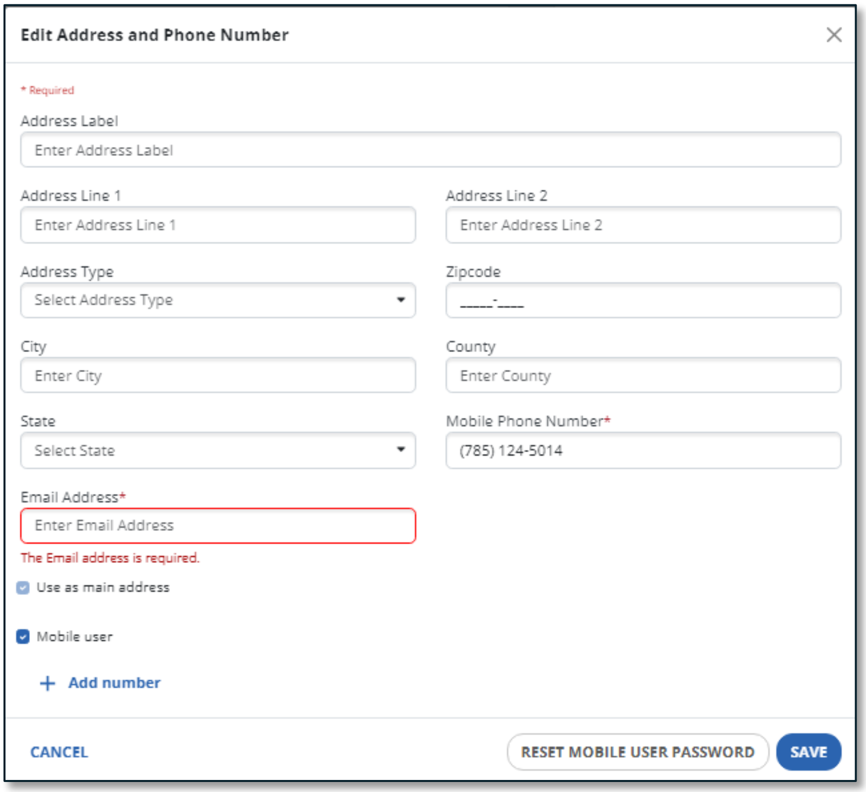


Addresses and Phone Numbers Tile

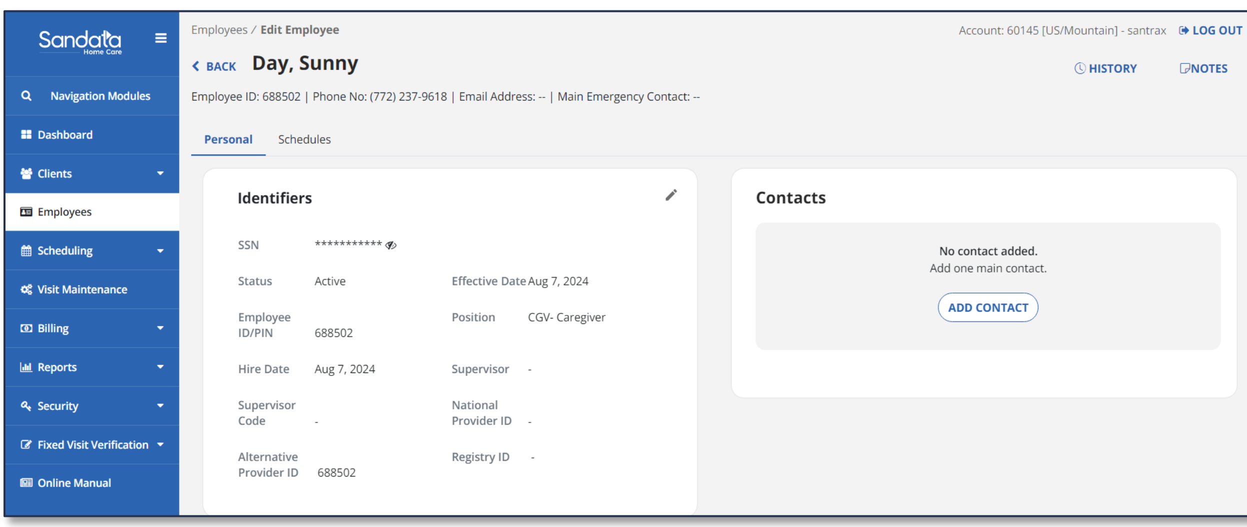
Mobile User Access Button

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.



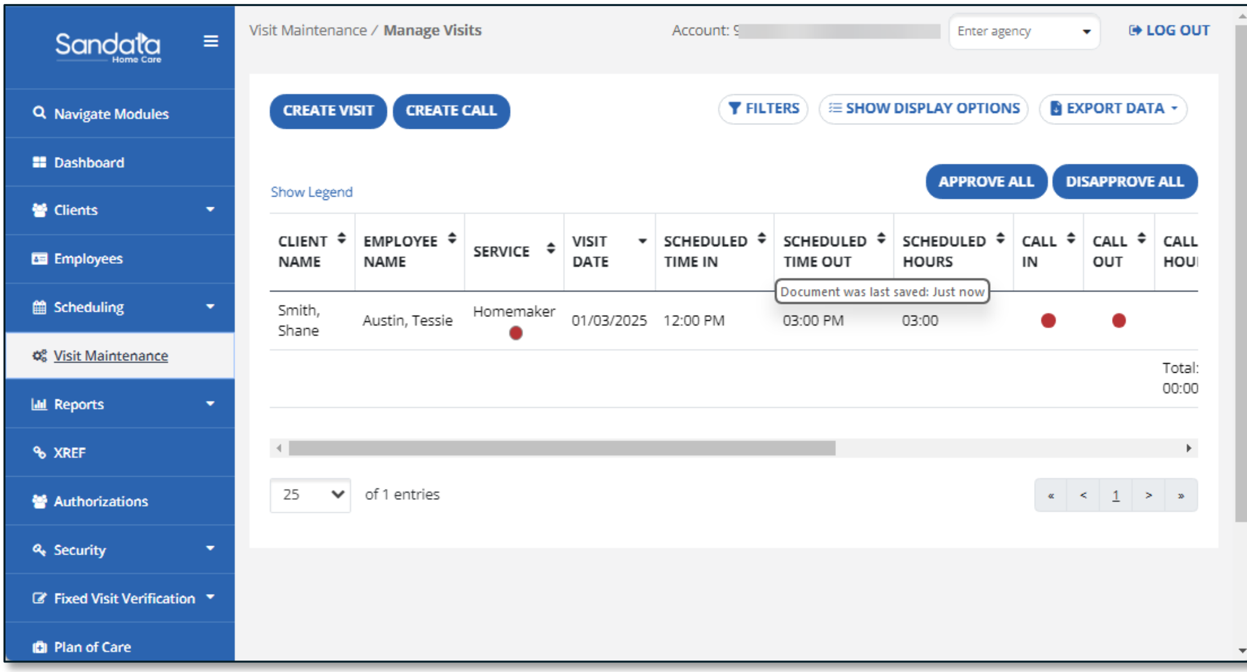
Edit Employee Address and Phone Number



Employee View with Personal Identifiers and Contacts

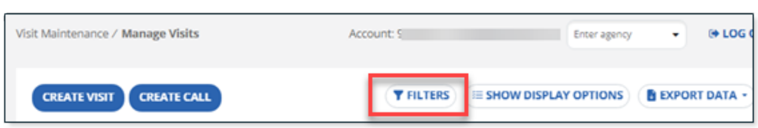
Visit Maintenance

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.

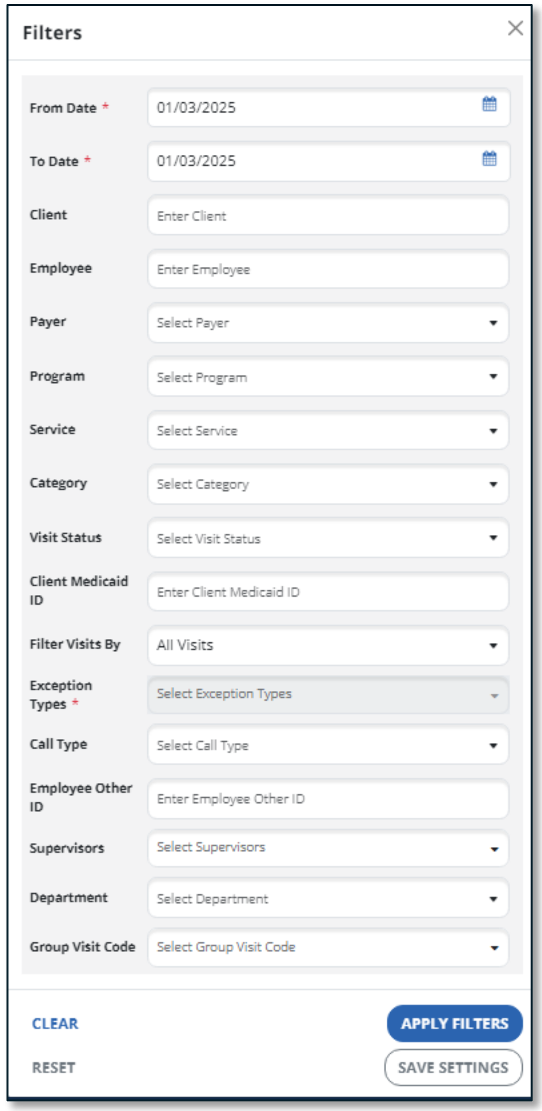


Easy-to-use Visit Search

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



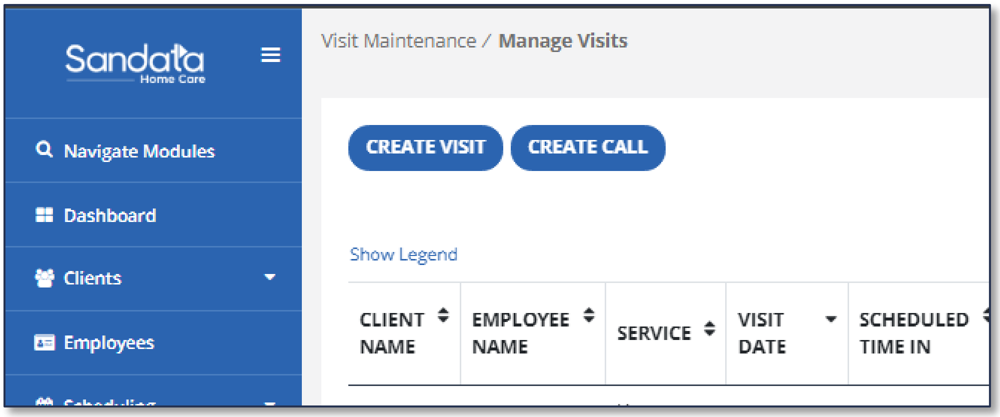
Filters Button in Visit Maintenance



Filters 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.



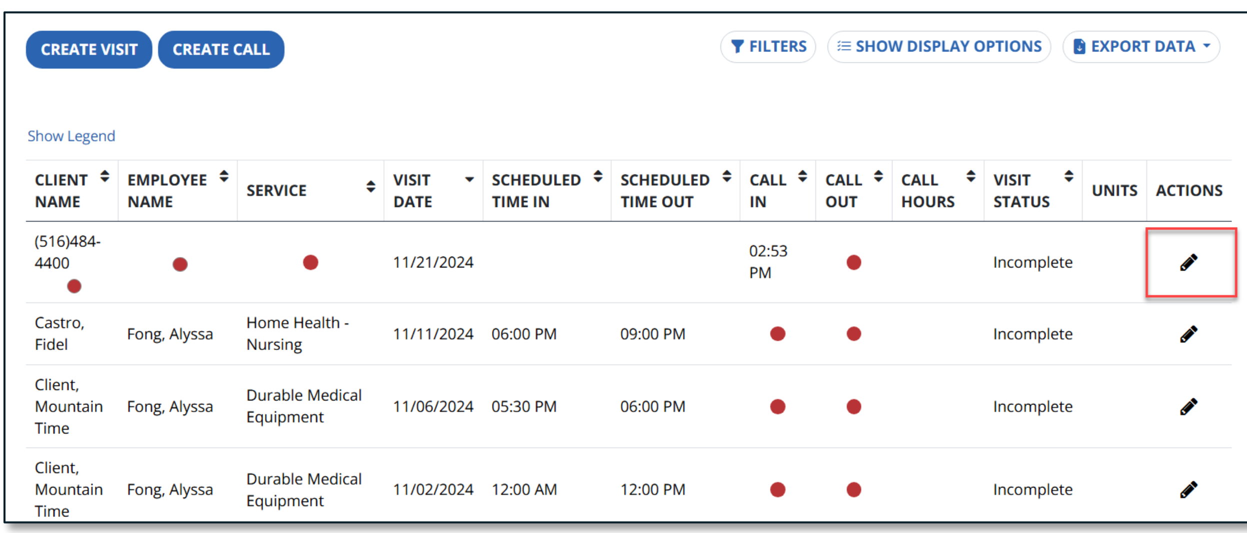
Create Visit and Create Call Buttons

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

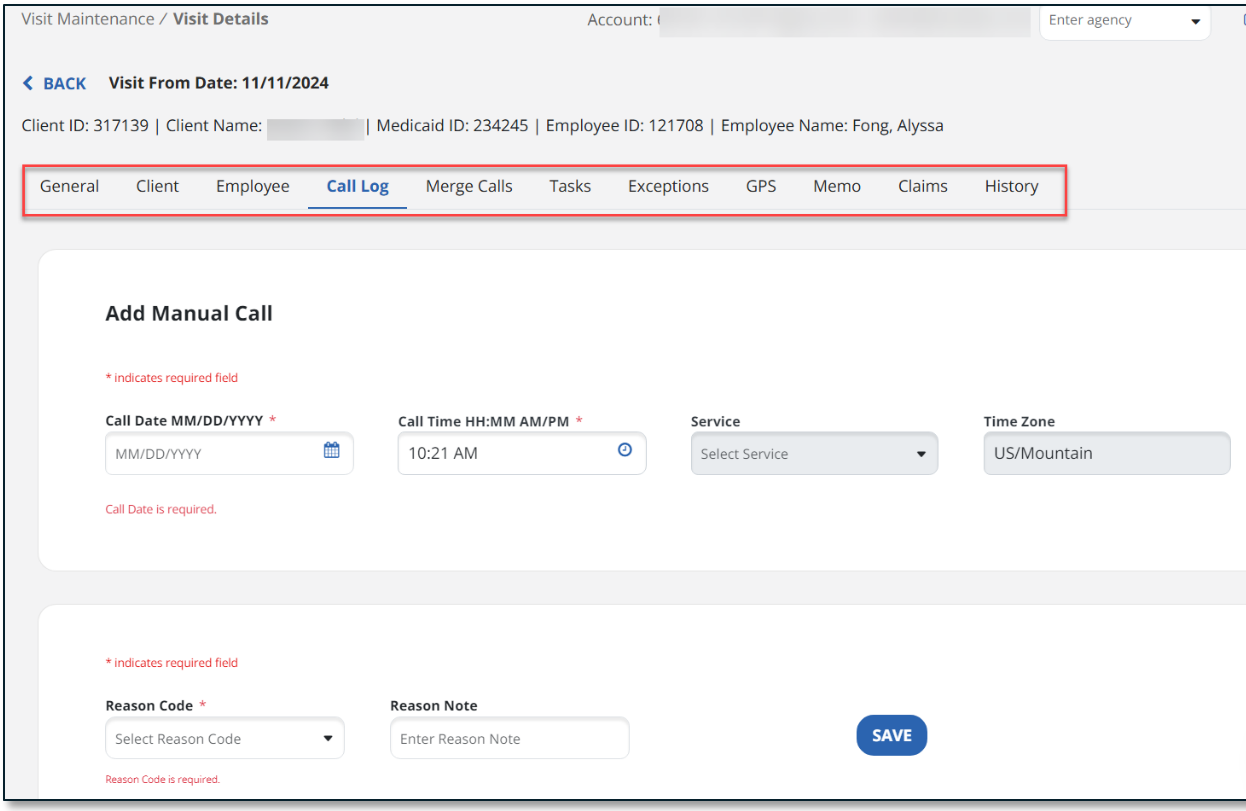
The prior Visit Details page had tabs going down the left side. The new page uses much more of the screen real estate with the tabs across the top, mirroring tab design in other modules. Users will land on this page by either selecting an exception dot on the Visits Grid, or by selecting the edit visit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

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



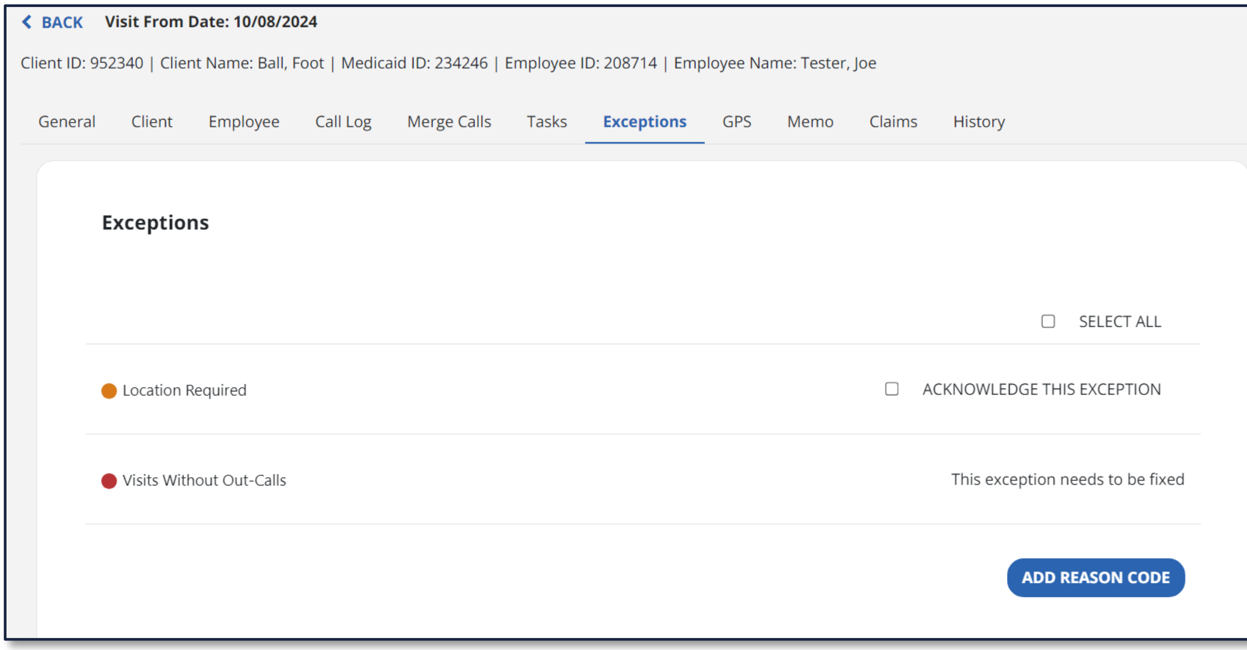
Edit Visit in Visit Grid

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.



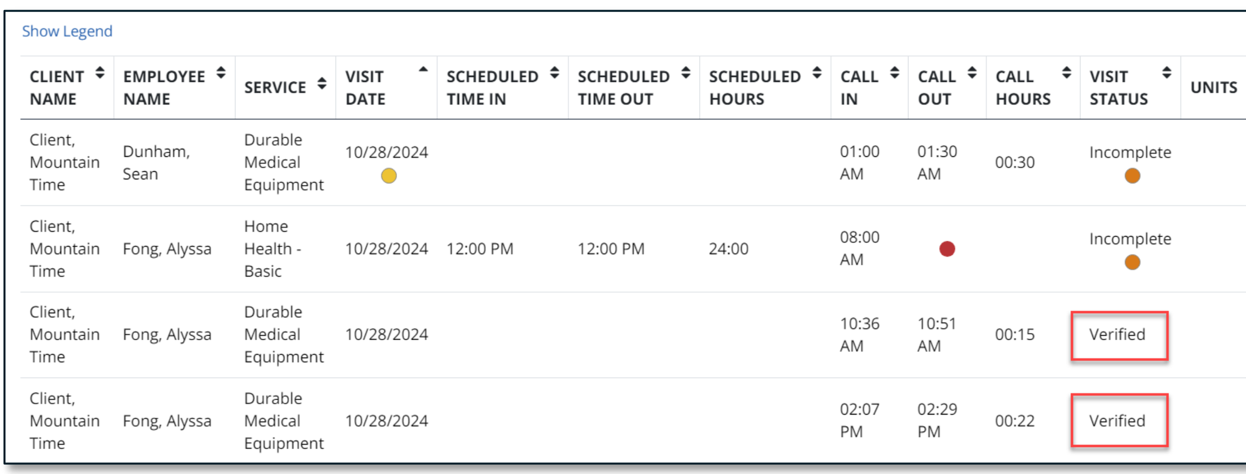
Tabs in Visit Details Screen

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.



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

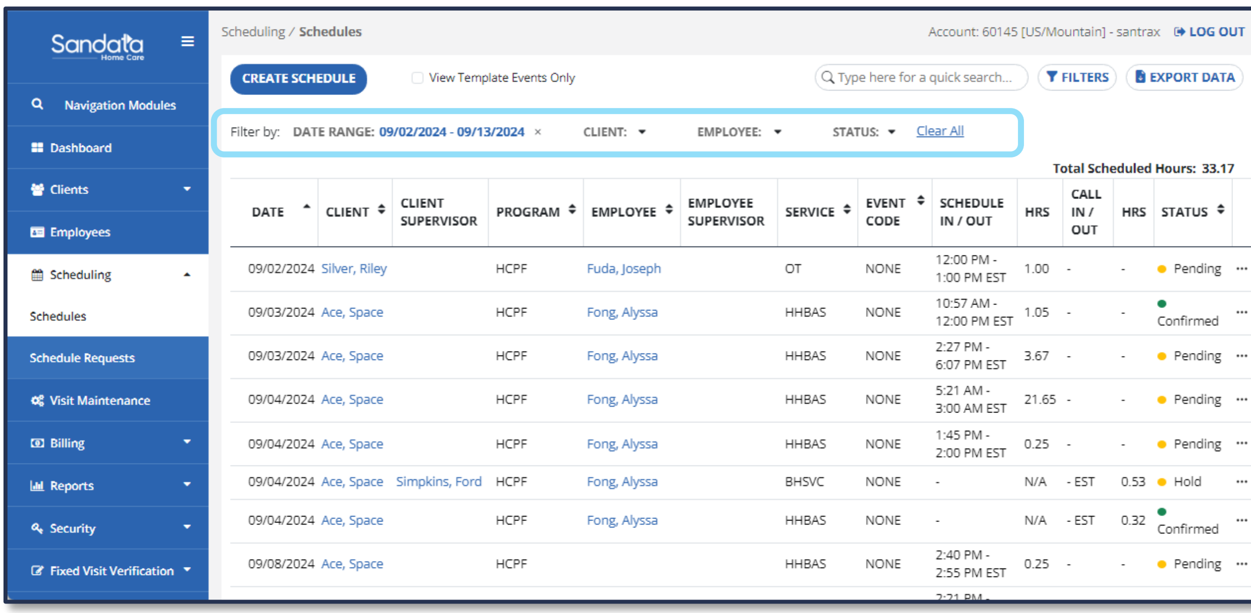
CLIENT NAME	EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	VISIT STATUS	UNITS
Client, Mountain Time	Dunham, Sean	Durable Medical Equipment	10/28/2024				01:00 AM	01:30 AM	00:30	Incomplete	
Client, Mountain Time	Fong, Alyssa	Home Health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

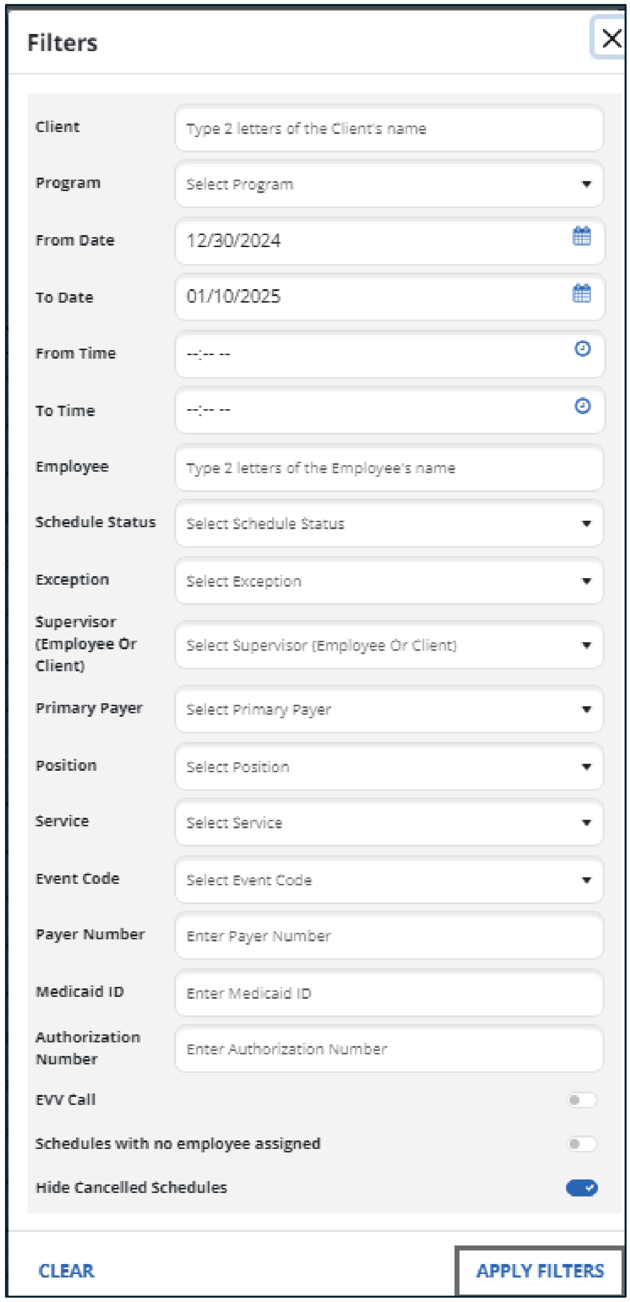
As shown below, the new quick filters are applied when entering the Scheduling module. Users can quickly adjust the date range, select a client, an employee, or a visit status to quickly find scheduled visits. Select the “x” to remove the loaded date range to view all scheduled visits.



Default Filters in Scheduling Module

Advanced Filters in Scheduling

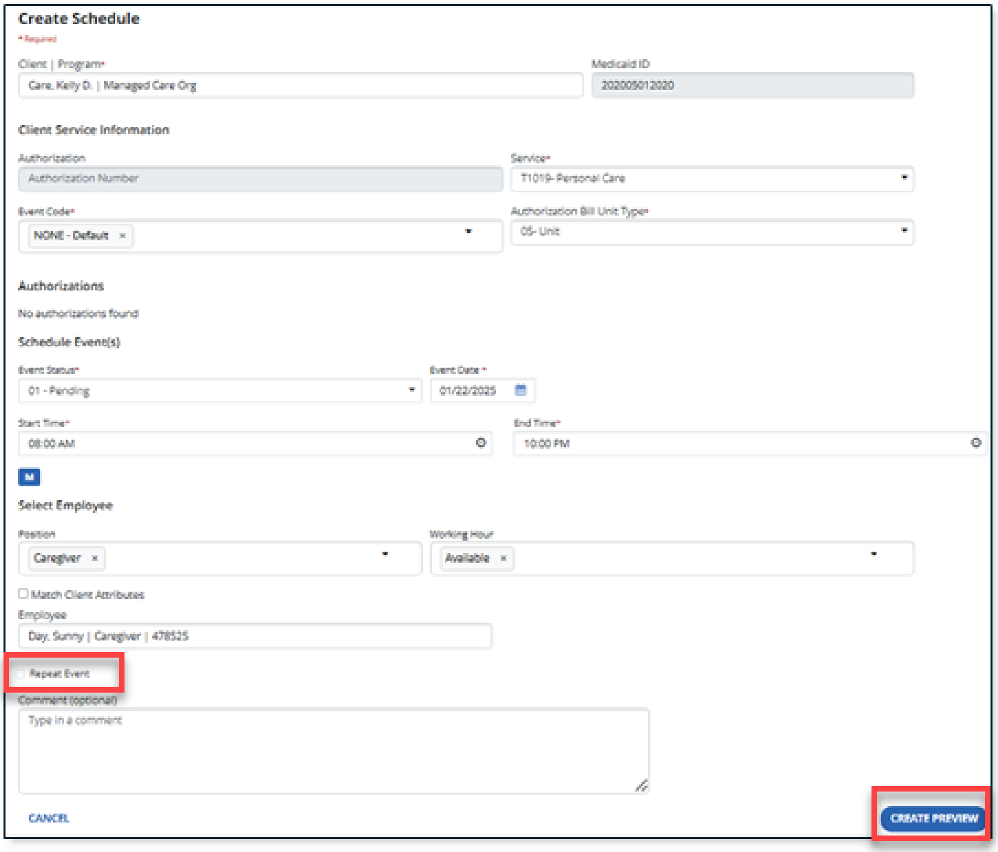
New search fields have been added to the Filters function in Scheduling to help users narrow down their search and quickly find the scheduled visit and make changes or cancel.



Filters Window in Scheduling Module

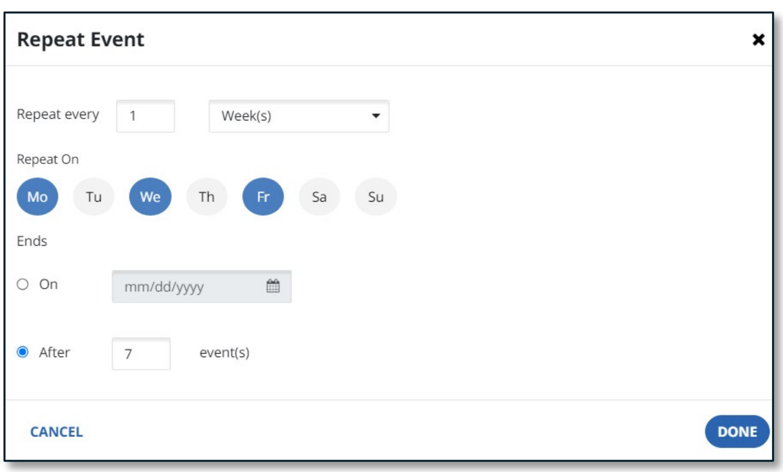
Creating Schedules

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.



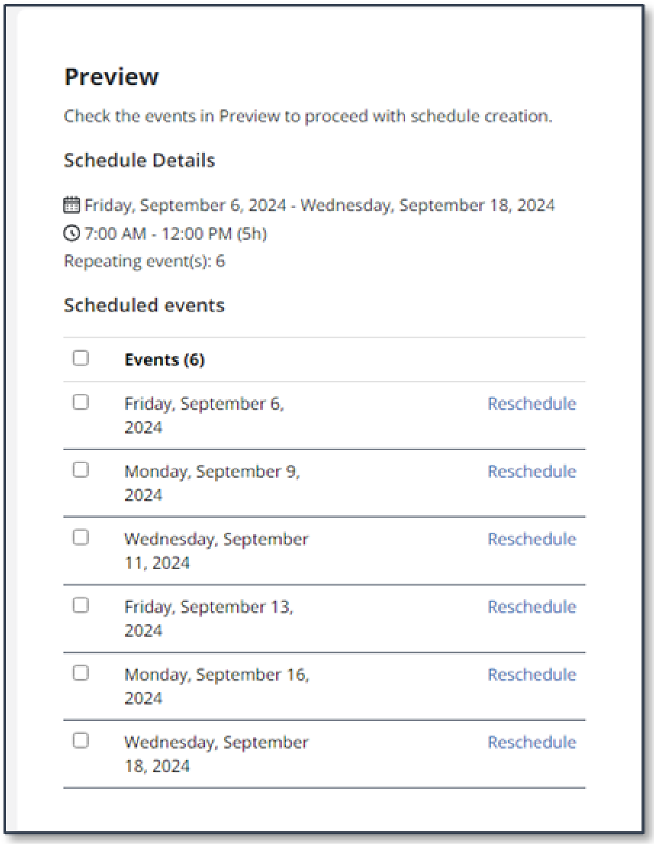
Create Schedule Window

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.



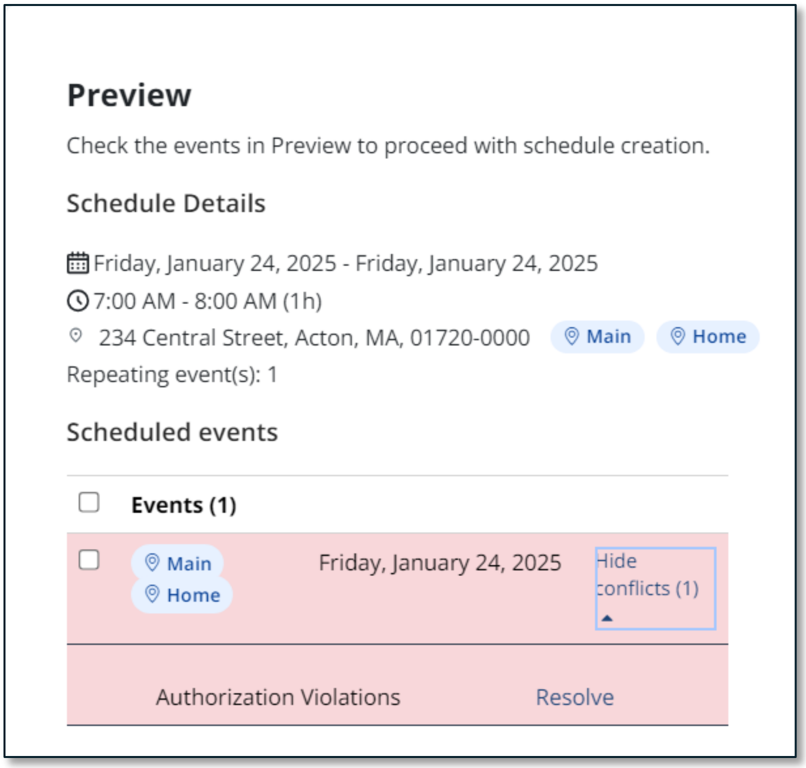
Repeat Event Window

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.



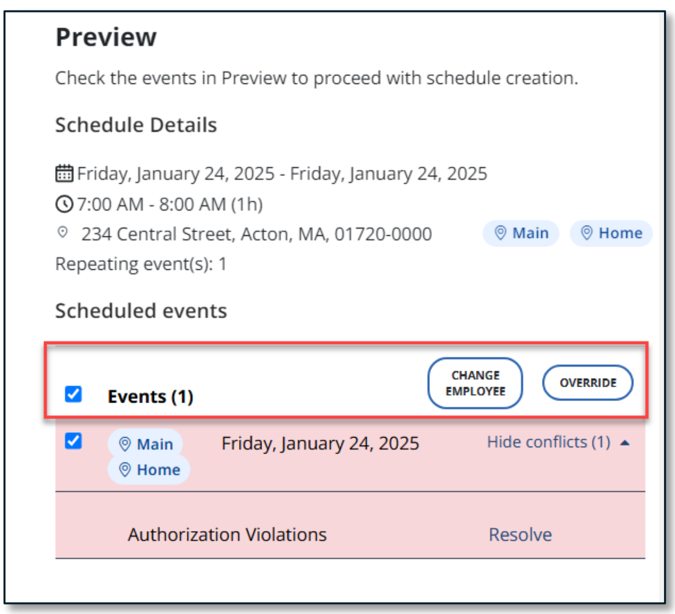
Schedule Preview

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.



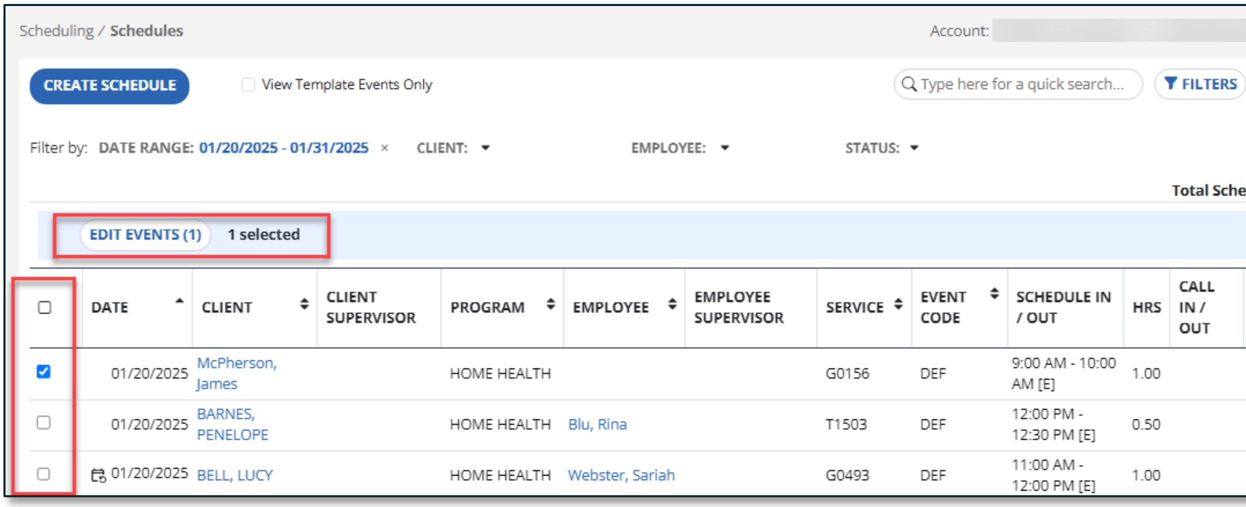
Schedule Preview Window with Conflicts

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



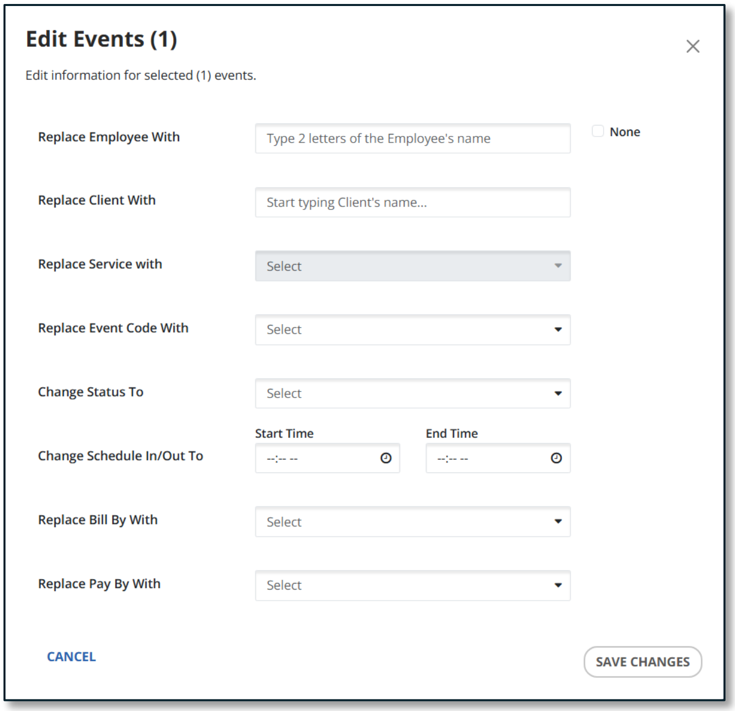
Batch Editing Schedules

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.



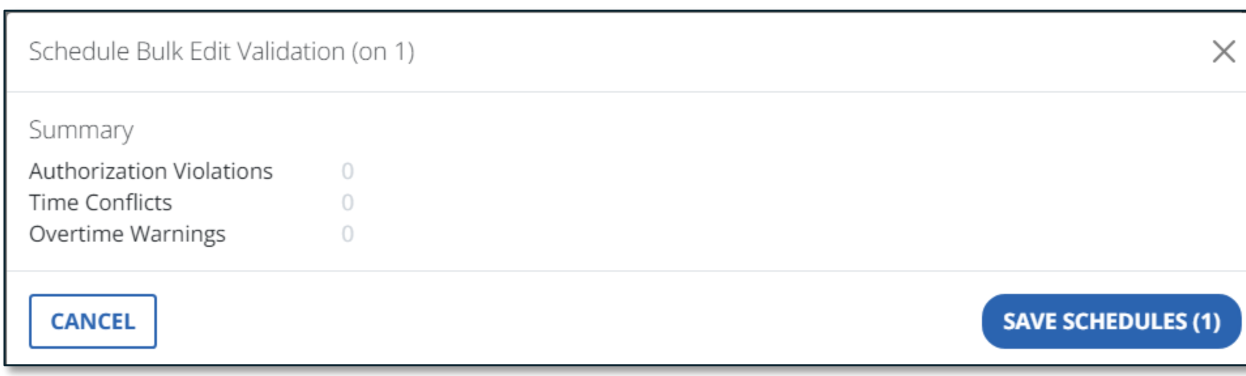
Edit Schedules Window

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



Edit Events 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.

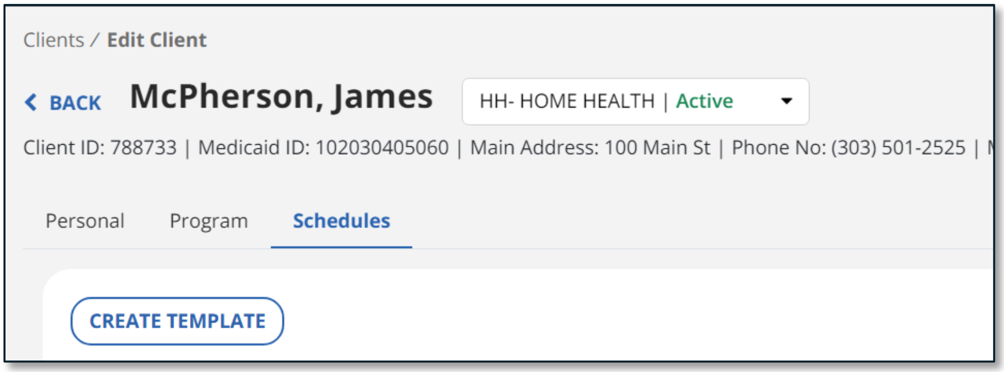


Bulk Edit Schedule Confirmation

Schedule Templates

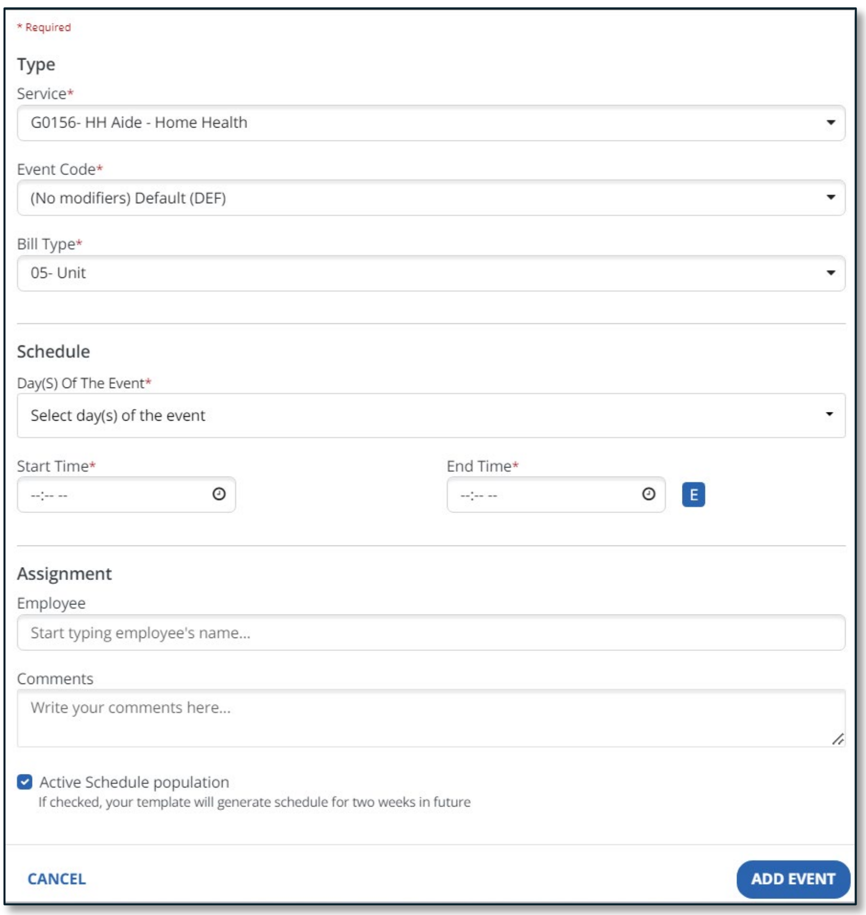
Recurring schedules can be set up by using Schedule Templates from the Schedules tab in the Client Profile. This allows users to schedule each day of the week by time and by employee. This is useful when clients need to be set up with a consistent schedule.

The Create Template button sits above the list of scheduled visits.



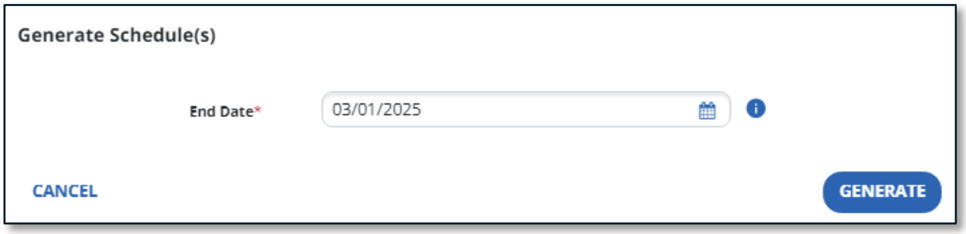
Client Schedule Tab

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



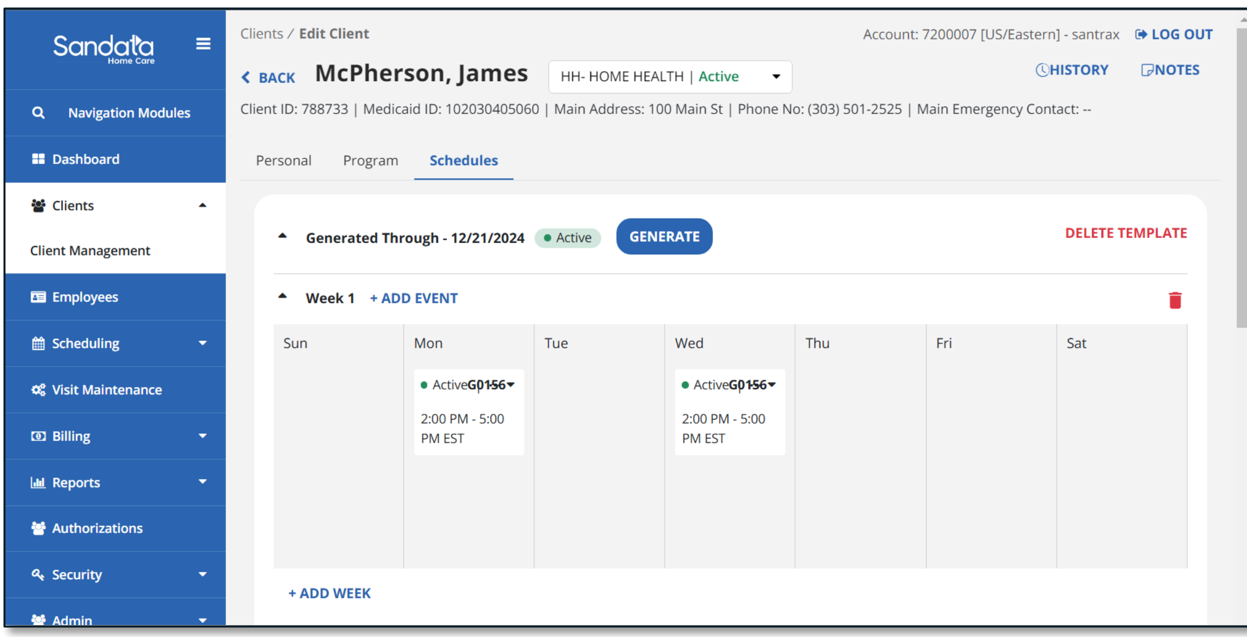
Create Template Window

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



Schedule Template End Date Window

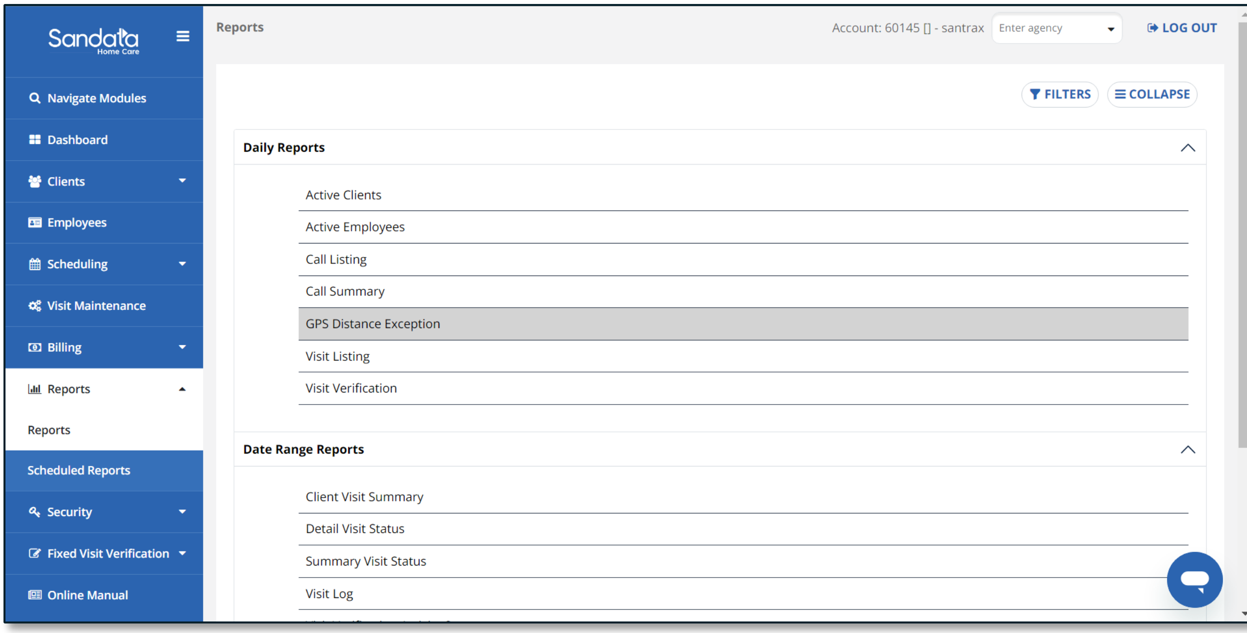
The schedule template appears in the client schedules tab. Additionally; the scheduled visits will appear for this client in the Scheduling module.



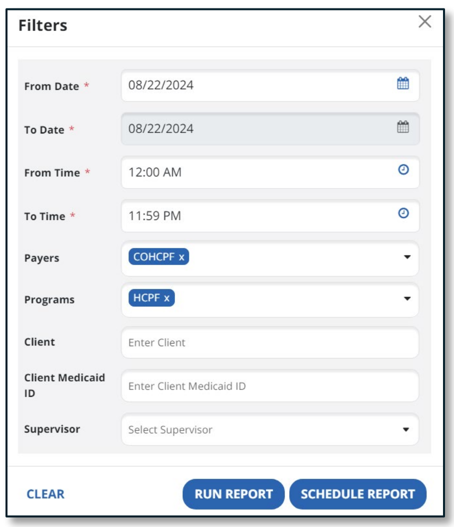
Generated Schedule Template view

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.



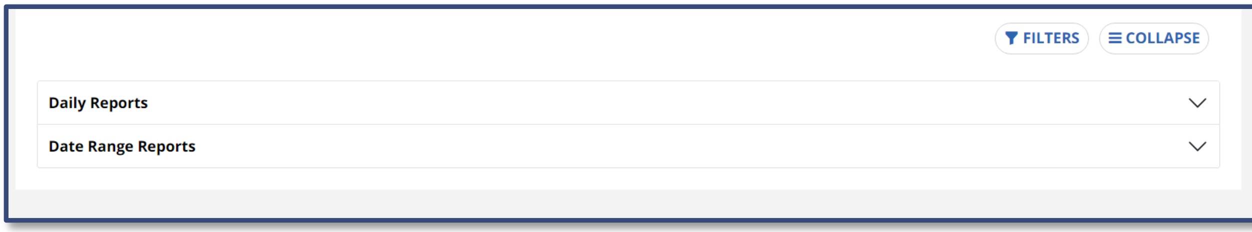
Reports Module List of Reports by Type and in Alphabetical Order



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.

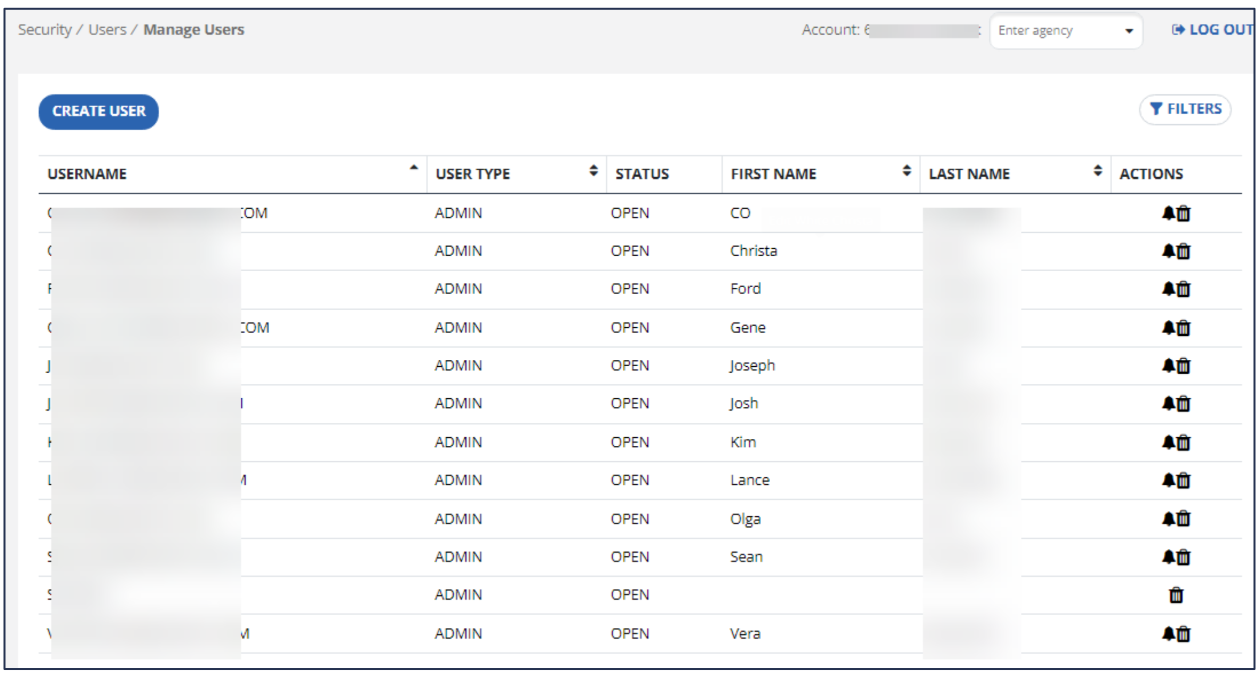


Reports Module in Collapsed View

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