HHAeXchange

Sandata EVV Info Session

July 2025

Presenters

Jim O'Brien
MassHealth
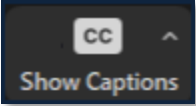Director of Federal EVV Compliance

Leah Klein
HHAeXchange
Customer Success Manager

Sam Howe
HHAeXchange
Customer Experience

Meeting Etiquette

▶ This session is being recorded and will be available on Sandata On-Demand, our knowledge base

- Portions of this recording may serve as an EVV training resource

- We will include a link to the <u>EOHHS EVV webpage</u> with this content

▶ Enable captions by selecting 'Show Captions' on your toolbar

▶ For questions, please use the 'Q&A' feature at the bottom of your screen

- Questions will be addressed during today's session.

- Questions will also be documented in Q&A documents on the <u>EOHHS EVV webpage</u> and <u>Sandata On-Demand</u>

- You can also email questions directly to EOHHS at <u>EVVfeedback@Mass.gov</u>

Agenda

- Introduction: HHAeXchange

- The Cures Act: What is EVV?

- MA EOHHS Program Recap

- Provider Self-Registration Portal

- Vendor Portal Access

- Training Opportunities

- Next Steps

Introduction to HHAeXchange

FEI Systems

HHAeXchange, Sandata, Cashé Software, and Generations have united to deliver advanced solutions for home and community-based services.

Our Mission

Enable caregivers, families, providers, and payers to deliver the best care in the home.

MA EOHHS Updates

EVV Implementation Overview

Electronic Visit Verification (EVV) is a federal requirement for **Medicaid-funded personal care and home health services that require an in-home visit.**

The Executive Office of Health and Human Services (EOHHS) administers the Massachusetts Medicaid program known as MassHealth. EOHHS oversees the implementation and operation of EVV in programs that provide certain home and community-based services.

Both **EOHHS** and the **Executive Office of Aging and Independence (AGE)** have identified certain services as required for EVV—these include services that are or are related to personal care services and home health services. Providers of these services are required to use EVV. **Please see the [Massachusetts EVV website](#) for the approved list of all service codes.**

The Massachusetts Electronic Visit Verification (EVV) program is live, and by now you are **expected to have registered in the [Provider Self-Registration Portal](#) and have begun using your chosen EVV system** to comply with Section 12006 of the 21st Century Cures Act.

Open Model Solution

The EOHHS EVV Solution is an Open Model which means that providers can use their own approved EVV System and send their EVV-related data to the EVV Data Aggregator, or they can utilize the EVV System that the State will provide. EOHHS calls these providers utilizing an EVV system other than the State provided systems as an "Alt EVV" provider.

State-Provided System	OR	Alt EVV
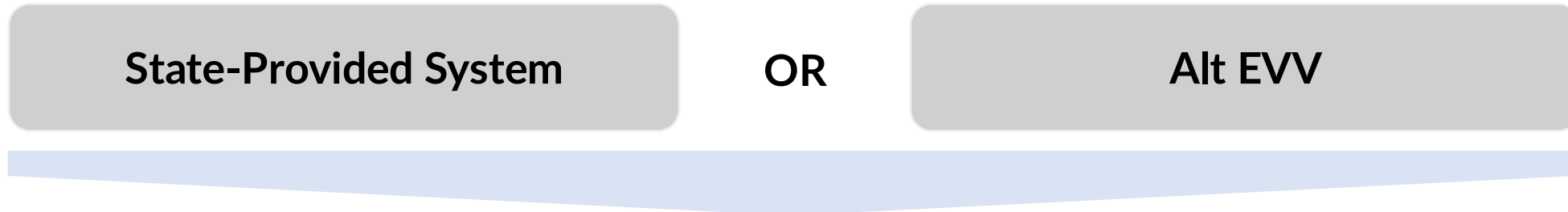
All visits, either verified in the state-provided EVV System or through a provider's approved alternative EVV System, will be sent to the EVV Data Aggregator. If a provider chooses to use an Alt EVV System, they will still be required to provide all of the 6 CMS EVV Requirement Elements per Section 12006 of the CURES Act.

Individual Receiving Service	Individual Providing the Service	Type of Service Being Provided
Location of the Service	**Date of the Service Delivery**	**Beginning and End Time of Service Delivery**

Current EVV Implementation By The Numbers

MA EVV Implementation metrics as of July 8, 2025.

429 Provider Registrations	**1,463** User Request Forms Processed	**267** Completed Admin Security Training
71,445 Employees Created	**46** Vendor Registrations	**3,662,399** Visits Captured

Initial & Future Compliance Thresholds

The Commonwealth of Massachusetts will be sharing compliance thresholds for EVV Implementation through your payer/managed care entity as they are finalized in the coming months. The initial stage of compliance is **registration and onboarding**.

Compliance	Measurement	Timing	Action
Initial Stage of Compliance Phase 1: Registration	Completed Registration for EVV	Passed Deadline	Failure to complete outlined compliance phase as required will result in further actions by MassHealth and/or your payer/managed care entity.
Phase 2: Compliance Visit Monitoring	Certain percentage of auto approved verified visits over a period of time, as indicated by MassHealth	Payer/Program-Dependent Coming 2025	Failure to complete outlined compliance phase as required will result in further actions by MassHealth and/or your payer/managed care entity.
Phase 3: Compliance Edit to Visit Match	Claim data must match EVV Visit data for payment	To Be Published	Failure to complete outlined compliance phase as required will result in further actions by MassHealth and/or your payer/managed care entity.

Provider EVV Implementation Key Tasks

01
Register & Indicate Choice of EVV System

Register with Sandata indicating use of the state-sponsored EVV system, Sandata, or an Alternate (Alt) EVV system.

For additional step-by-step registration guidance, reference the Massachusetts Detailed Instructions for Onboarding – Sandata Technologies.

02
Submit URF

Provider agency administrator submit the Agency-based Electronic Visit Verification (EVV) System and Data Aggregator User Request Form (URF) to obtain Single Sign-On (SSO) credentials.

For assistance with SSO credentials and the URF, please reach out to the Virtual Gateway Customer Service Phone (800) 421-0938 or reference the Virtual Gateway Business Login User Reference Guide.

03
Complete Training

Log in to Sandata Learn, the Sandata Learning Management System, and complete applicable training. You can choose to register for upcoming live instructor-led sessions or enroll in self-paced online courses that will continue to be available 24/7.

Complete training applicable to your user type (including Alt EVV).

04
Rollout Training to Employees

Rollout training for your employees/ workers.

Reference the Sandata Employee Training Toolkit and the Caregiver Library section of Sandata On-Demand to review training documents for the Sandata Mobile Connect app.

05
Setup Employees

Setup Sandata Employees or Customize Alt EVV per Sandata Specification.

For technical help in using the EVV system, please contact Customer Support through Submit a Request at Sandata On-Demand. You may also call the Customer Support line at 833.511.0164.

06
Employees Begin Using Sandata or Alt EVV

Employees should be using Sandata to log EVV Visits or send EVV Visits as Alt EVV.

Review questions submitted during the Town Halls and answers provided by Sandata staff. Additional EVV policy information is available on the MA EVV website.

07
Visit Maintenance

Administrators update and correct visits inputted by their employees.

Registration	Onboarding

EVV Overview

What is Electronic Visit Verification (EVV)?

- A digital way of keeping track of visits.
- Ensures that care services are being delivered as authorized, prevents fraud, and improves the efficiency of care coordination.

21st Century Cures Act: Requires **EVV** for all Medicaid-funded personal care and home health services.
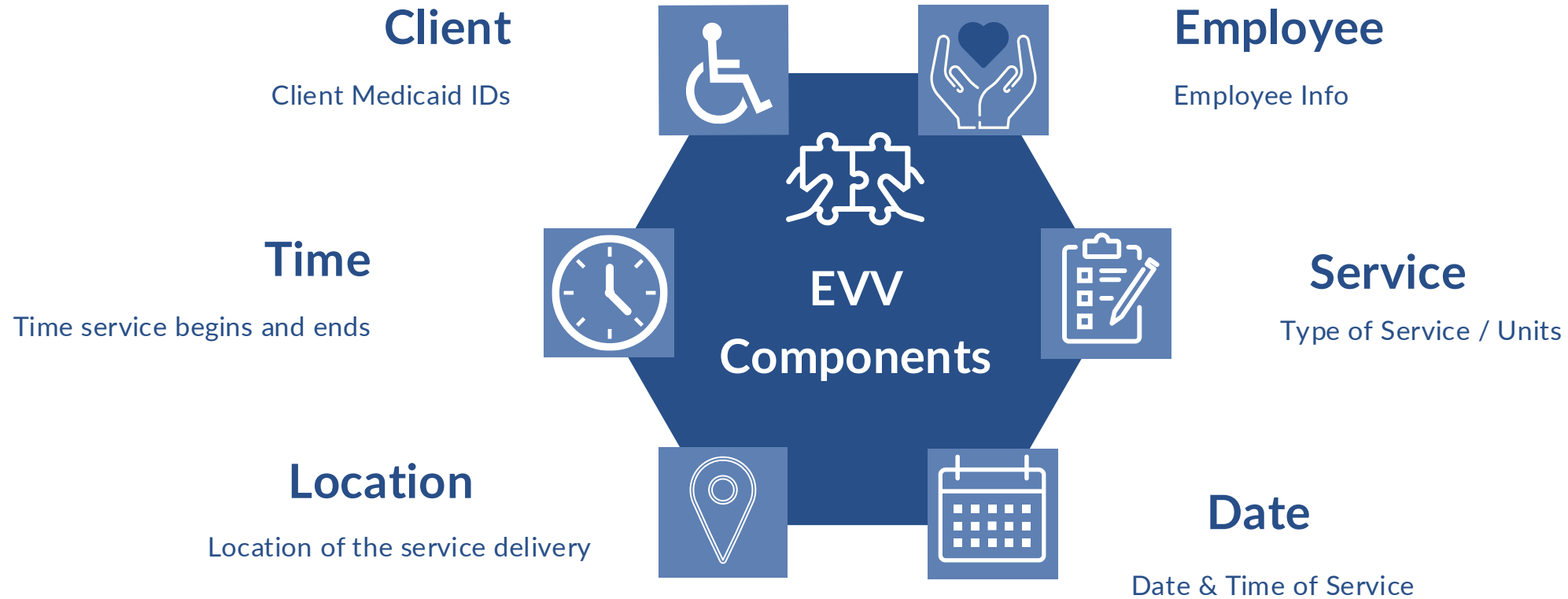
What are the 6 elements of a Cures Compliant visit?
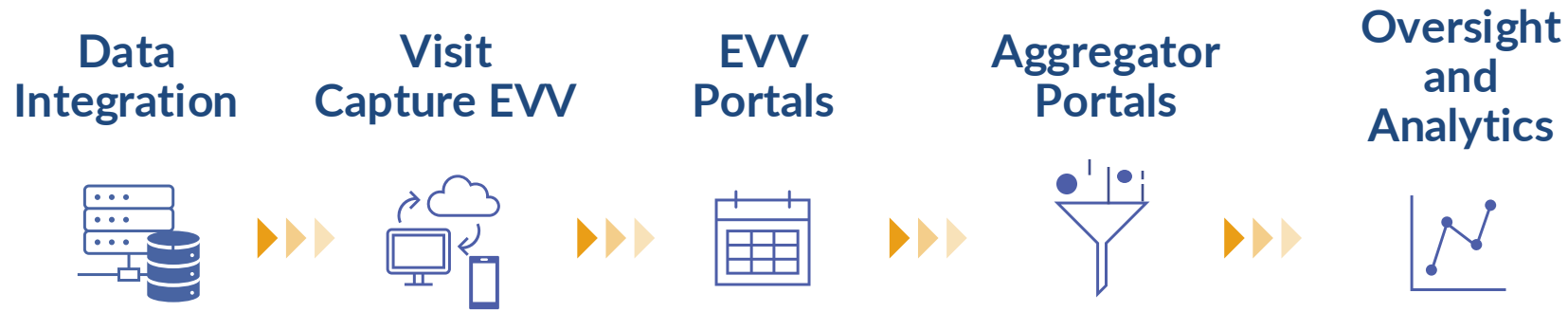
Visit Data Elements for EVV

Every visit must include the 6 requirements to be EVV compliant.

Client

Client Medicaid IDs

Time

Time service begins and ends

Location

Location of the service delivery

EVV Components

Employee

Employee Info

Service

Type of Service / Units

Date

Date & Time of Service

Sandata EVV

Sandata State-Sponsored Solution

Data Integration	Visit Capture EVV	EVV Portals	Aggregator Portals	Oversight and Analytics

Data Integration

- Information provided from the State can be used by providers to ensure their members are eligible to receiving care

Visit Capture EVV

- Multiple available EVV technologies ensure real-time visit data and verification is always available and captured at the point of care

Sandata EVV™ Portals

- Sandata EVV users can view visit data through an easy-to-use user interface to monitor activity and make visit capture corrections as required

Sandata Aggregator

- Collates and normalizes all provider data against EOHHS's business rules, regardless of which EVV system you use

Oversight and Analytics

- A variety of reports allowing provider agencies to view and export EVV activity

For Employees in the field – Sandata Mobile Connect®

Sandata Mobile Connect (SMC) meets your employees and members where they are to ensure an easy-to-follow experience.

▸ Primary method of EVV for state programs

▸ Available for iOS / Android

▸ Works Connected or Disconnected ("Offline")

▸ Captures GPS at the Start and End of the Visit

▸ Supports multiple languages (for the employee and member) to support diverse needs
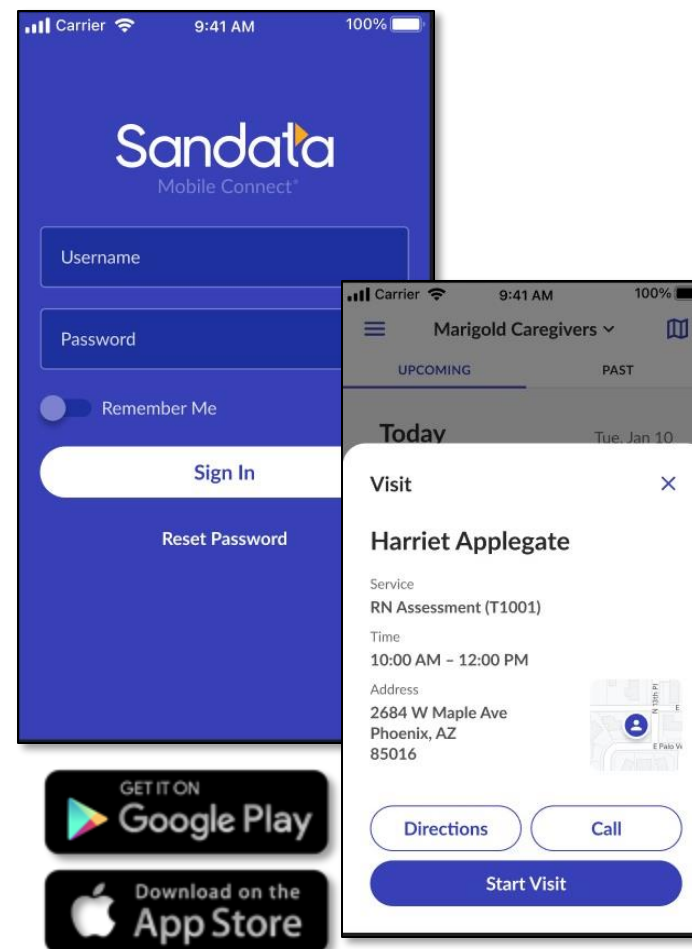
Providers Choosing a 3rd Party Alternate EVV (AltEVV) System

Alternate EVV (Alt EVV) at a High Level

What is Alt EVV?

- You can use any EVV vendor system
- The vendor will submit your data to the Sandata Aggregator
- View your data in the Aggregator

The Vendor Certification Process

- Vendor certification begins with a single provider agency identifying that vendor in the **Provider Self-Registration Portal** as their Alt EVV vendor
- The vendor then registers in the **Vendor Registration Portal** to start the certification process
- The vendor completes testing to be certified to send data compliant with the EOHHS specifications

Vendor Testing

I identified my vendor. Now what?

1. Contact your vendor and direct them to register in the [EVV Vendor Self-Registration Portal](#).

2. Vendor completes testing using the [Alt EVV Testing Specifications](#).

3. Vendor receives confirmation they've completed testing and you receive confirmation you can log into Aggregator using the Virtual Gateway.

4. Vendor's system will transmit all visit information on at least a daily basis.
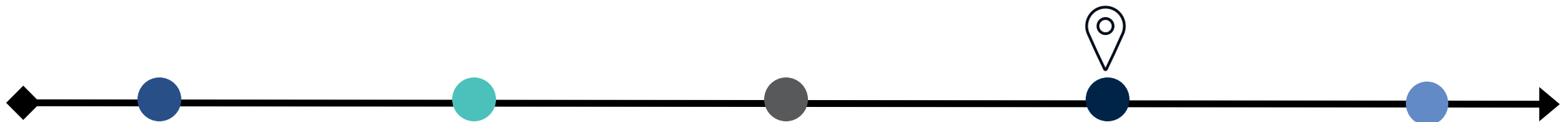
Vendor Testing

AltEVV Specifications

Includes:

- Specs Overview
- Audience for Specs
- File Formatting
- Required Data
- And Much More...

EVV Onboarding

Onboarding Process

01
Register for EVV
REGISTER

02
Complete URF for your agency

03
Complete on-demand training through Sandata Learn
E-LEARNING

04
Sandata Users: Enter Users, Train AltEVV Users: Vendor Testing

05
Monitor EVV Visit Data

Onboarding Process

- [Get Ready Checklists](#) are available on Sandata On-Demand with quick-start versions for Alt EVV providers, Sandata EVV providers, and more detailed instructions for both.

Step 1: Register for EVV

Where does a provider agency administrator go to access the EVV Provider Self-Registration portal?

- [EVV Provider Self-Registration Portal](#)

What is needed to successfully complete registration?

- Provider Agency Administrator must complete registration.
- The Provider Identification Number (PID/SL) is the unique 9-digit identifier required for registration.
- Only one registration is needed unless your 9-digit number changes.

Why is provider registration required?

- First onboarding step for your provider agency.
- EVV designation (Sandata EVV or Alt EVV vendor) determines the provider account in the Sandata Aggregator.
- Provider agency accounts are linked to the MassHealth Virtual Gateway for Single Sign-On (SSO).

Sandata
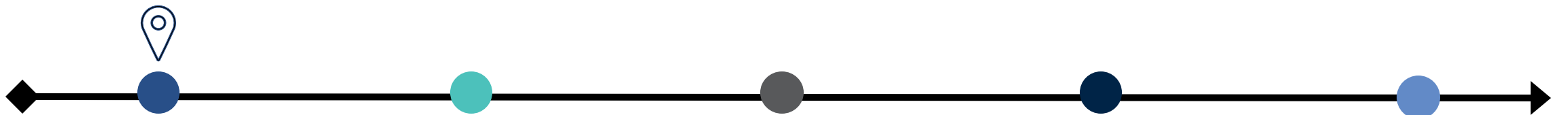Get more right from the start

EVV Provider Self-Registration

Please select the EVV program in which you would like to register:

SELECT EVV PROGRAM *

Massachusetts EOHHS ▾

Please enter your unique provider identifier for the EVV program:

ENTER PROVIDER MEDICAID ID *

Enter Provider Medicaid ID

Register

Step 1: Register for EVV
AltEVV Providers with Multiple Vendors

- Complete the Sandata Self-Registration <u>only one time</u> and include <u>only one AltEVV Vendor's information</u>

- Submit a Sandata Support Ticket include the following information:
  - The PIDSL you registered with
  - Indicate that you have already completed Self-Registration and specified one AltEVV Vendor but you have more than one Vendor to integrate
  - The AltEVV Vendor Names and a point of contact for each Vendor

- **Important Notes:**
  - Integrating multiple AltEVV Vendors with Sandata <u>will take some time</u>. Typically, Sandata can support integrating with one Vendor at a time for testing and integration credentials purposes.
  - Make sure to notify each of your Vendor points of contact that you have initiated the Sandata integration process for Massachusetts and you expect them to engage with Sandata in that process
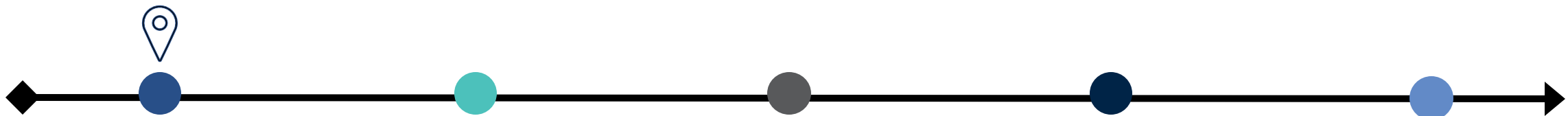
Step 2: Complete the URF for Your Agency

- The agency admin must complete the User Request Form (URF) for their agency.

- **Note**: Ensure that the email address used for registration matches the email used for Virtual Gateway.

- **User Request Forms**

Mass.gov

Search Mass.gov

🏠 > Health & Social Services > Virtual Gateway > Organization Management

🏛 OFFERED BY   Executive Office of Health and Human Services

User Request Forms

In order to gain access to the Virtual Gateway, an organization's Access Administrator must complete the appropriate User Request Form (URF) and Rider Form, if required by business service.

User Request Forms (URFs)

Each URF is specific to the Virtual Gateway service an organization will use so please select the appropriate URF below. Please download a copy to your desktop, complete the form as per the instructions on the form, and email the complete form to the email address indicated on the form.

- Agency-based Electronic Visit Verification (EVV) System and Data Aggregator User Request Form (URF)
- Appeals Processing System (APS) User Request Form
- BSAS eLicensing Provider User Request Form
- Children's Behavioral Health Initiative (CBHI) User Request Form
- ClearPoint Strategy User Request Form (State Employees Only)

Step 2: Complete the URF for Your Agency

- Each user of Sandata EVV or Aggregator **must** have their own MassHealth ID.

- Final setup steps will be emailed once the URF request has been processed.

- Legacy logins **must** be switched to Business logins (contact Virtual Gateway support).
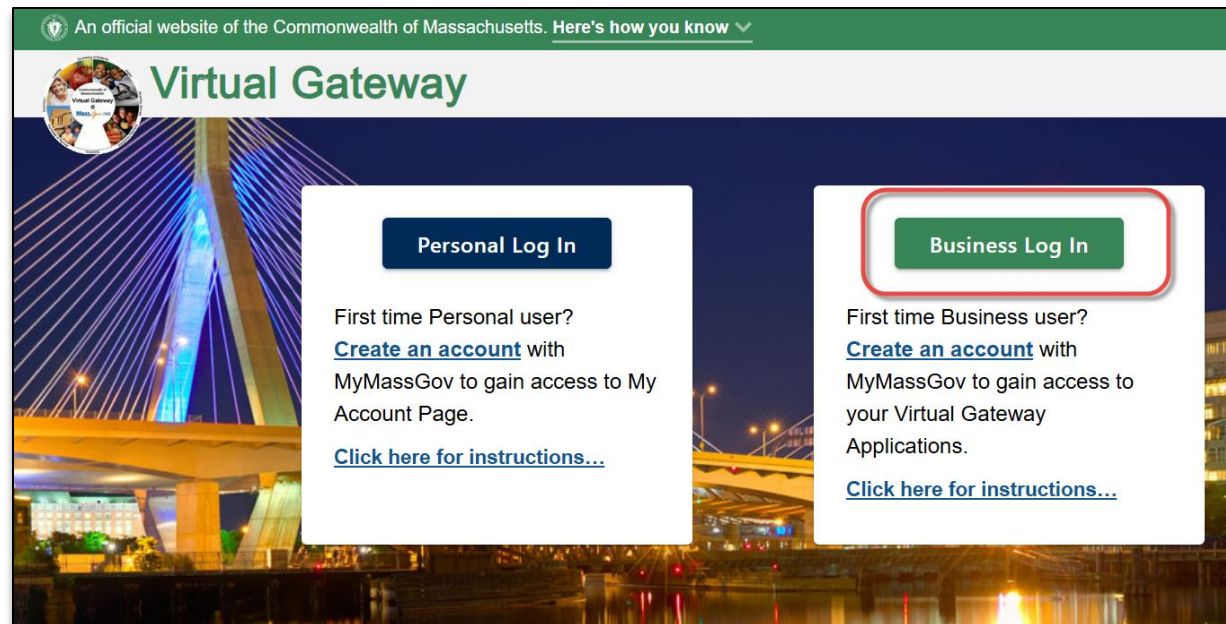
> Contact the Virtual Gateway Customer Service Phone at 800.421.0938 to convert Legacy login to Business login.
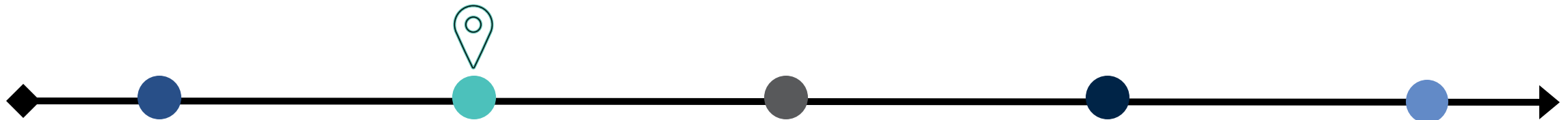
Step 2: Complete URF for Your Agency

Once your URF has processed, you can select the Sandata EVV and Aggregator tile in the Virtual Gateway and access the application through Single Sign-On (SSO).
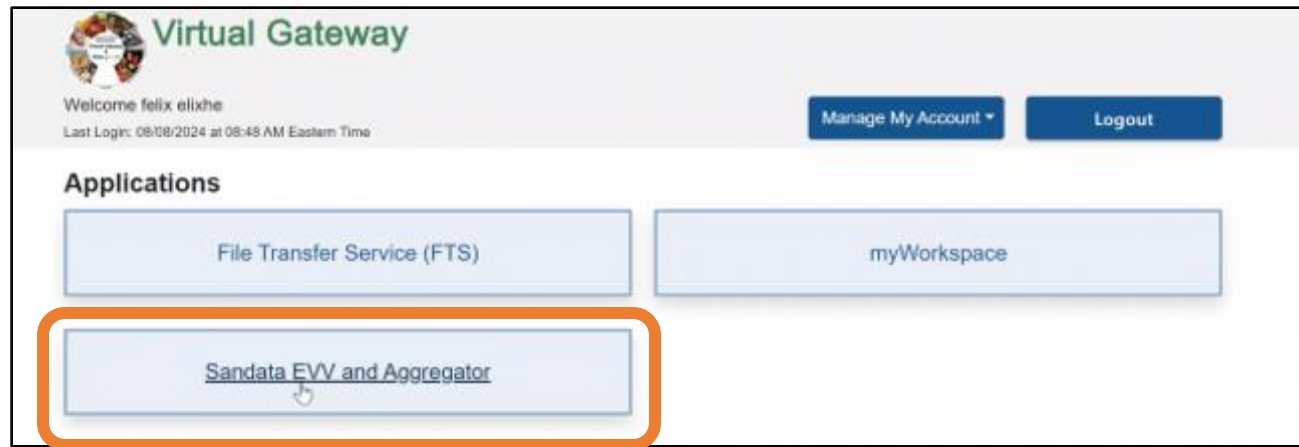
Note: It may take up to 10 business days for the URF to process before gaining access to Sandata EVV and Aggregator.
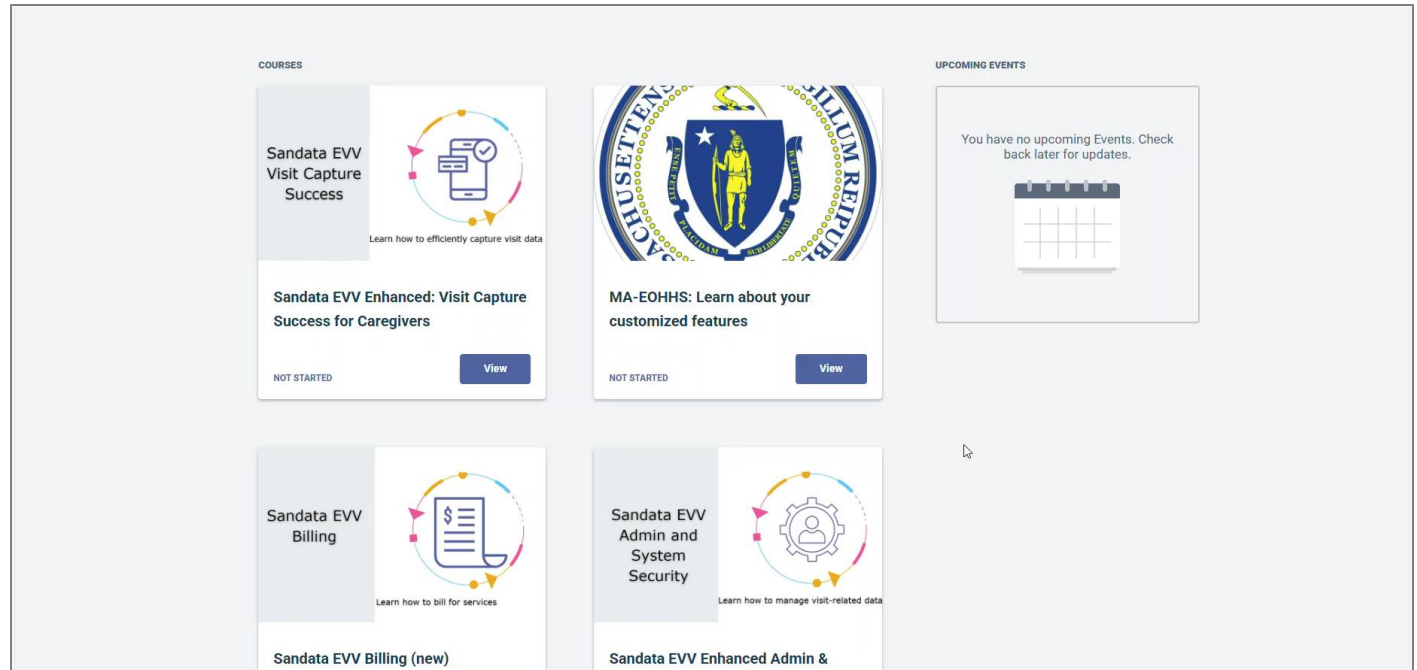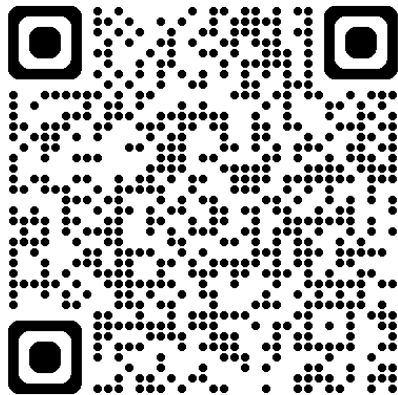
EVV Training

Step 3: Complete On-Demand Training Through Sandata Learn (Sandata EVV Users)

While you wait for the URF to process, take this time to access on-demand training at your pace, at your time!

Agency administrators need to take the **MA-EOHHS Sandata EVV: Admin & System Security** course.
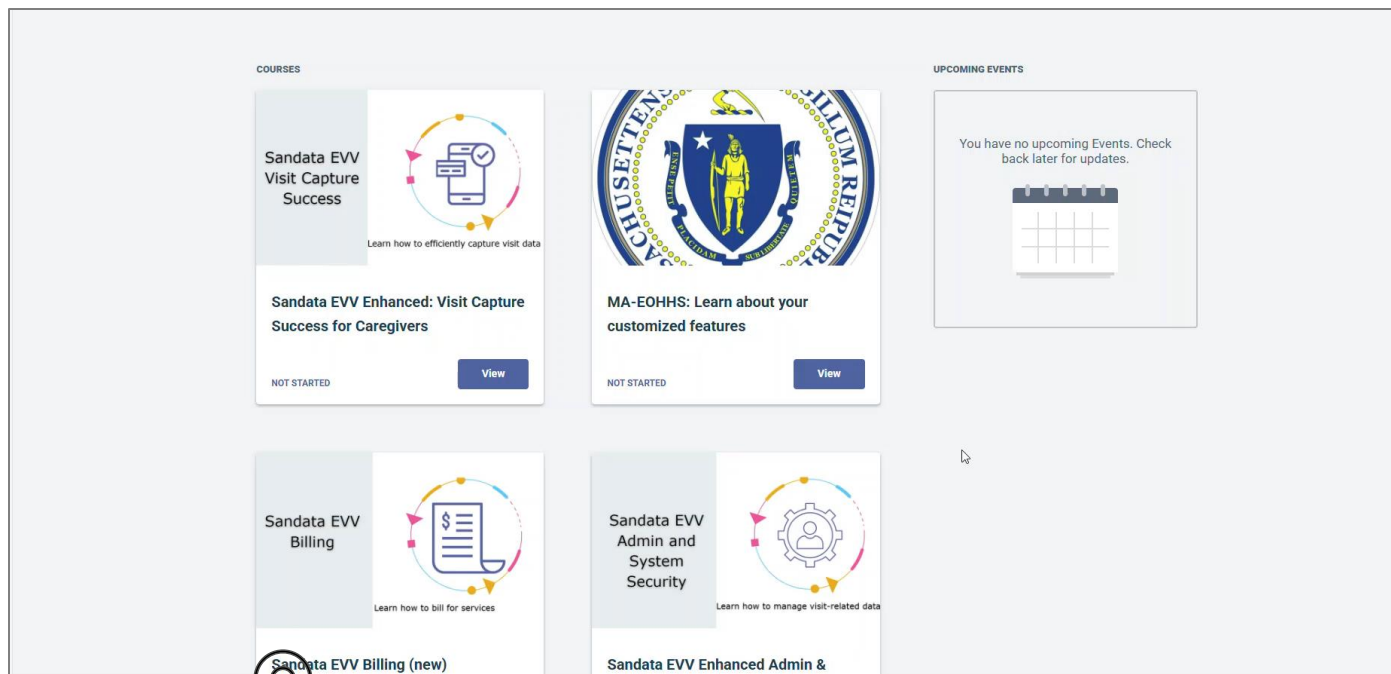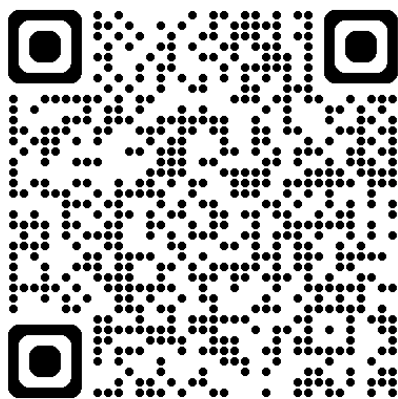
Step 3: Complete On-Demand Training Through Sandata Learn (AltEVV Users)

While you wait for the URF to process, take this time to access on-demand training at your pace, at your time!

Sandata Aggregator users can take the **Aggregator** course and **MA-EOHHS: Single Sign-On(SSO) for Aggregator Users**.
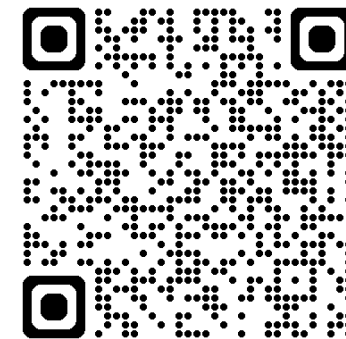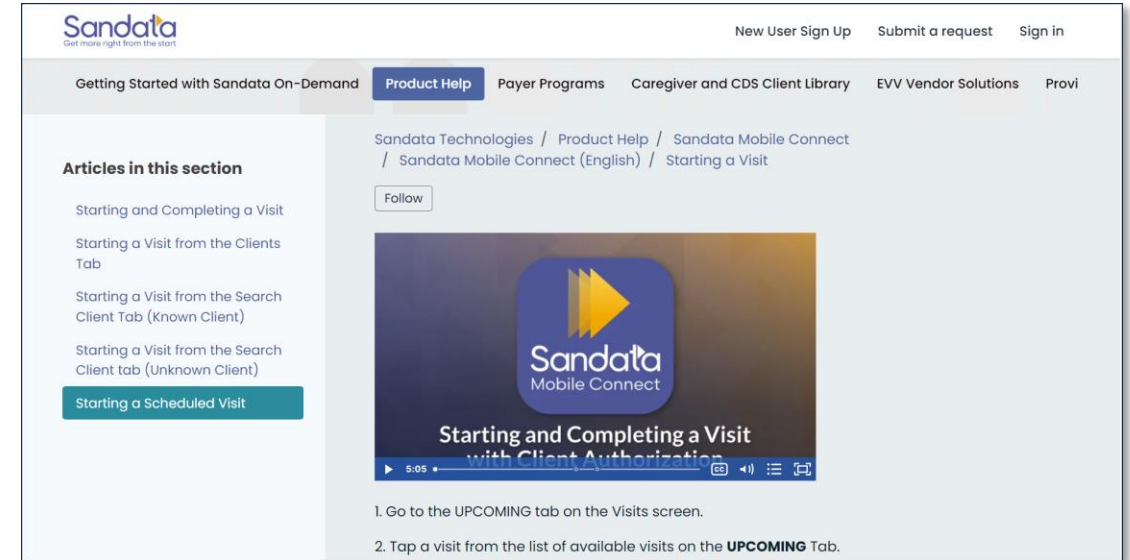
Step 3: Complete On-Demand Training

Access **self-serve resources** and **state-specific materials** on Sandata On-Demand.

- Watch recorded training webinars in [Training Replays](#)!

- Use the [Caregiver Library](#) to train employees to use Sandata Mobile Connect to capture visit data.

- Access and follow help articles (like Vendor Specs for AltEVV users)

Step 4: Create Users in Sandata

Steps

1. Once logged in to Sandata EVV, click **Security** > **Manage Users**.

2. Click **Create User**.

3. Fill in the required fields, including **Username/Email, Last,** and **First Name.**

   Note: Ensure that the email address used for **Username/Email** matches the email used for Virtual Gateway.

4. Select from the **Available Roles** to assign proper permissions to this user; click the **>** arrow to assign the role.

5. Click **Create User**.

6. Let your employees know they can now access Sandata EVV through the Virtual Gateway!
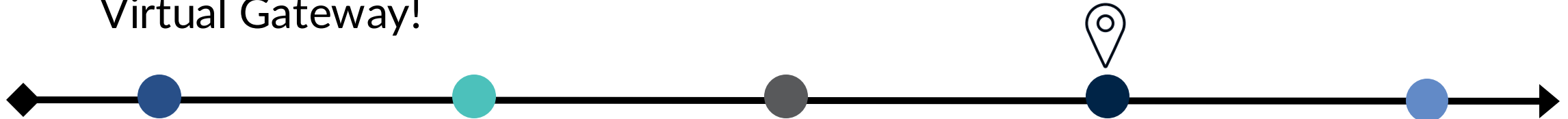
Monitoring Visit Data
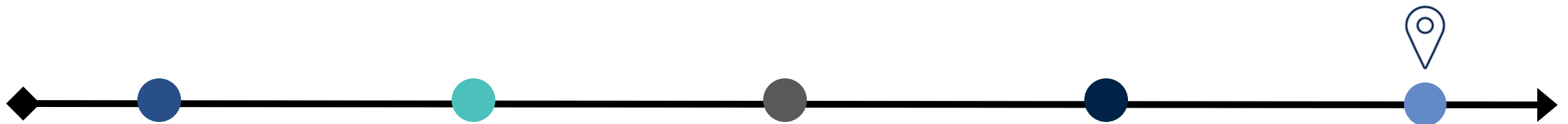
Step 5: Monitor Visit Data

Sandata EVV Users:

- Train your employees to accurately capture visit data and maintain your visit data using the Visit Maintenance module.
- Use the reports in the Reports module of Sandata EVV to monitor your success.

AltEVV Users:

- Monitor your visit data in Sandata Aggregator and leverage the reports to monitor your EVV success.
- Sandata will apply rules to the data received including...
  - Does the member exist in the supplied Massachusetts data?
  - Does the transmission meet all the established rules?
  - Sandata's Aggregator will apply all 'business rules' also known as exceptions

Step 5: Monitor Visit Data (AltEVV Users)

What could go wrong?

(1) **MassHealth Client & Auth Import:**
- MassHealth may not import a client or authorization that is in scope. This would result in a client endpoint failure
- MassHealth may import client or authorization data that is incorrect

(2) **Client and Employee Endpoints:**
- Provider/AltEVV Vendor may follow specs incorrectly. This would result in a client and/or employee endpoint failure

(3) **EVV Visit Import:**
- Provider/AltEVV Vendor may follow specs incorrectly. This would result in a visit import error

General Responsibilities for MA, Sandata, & Managed Care Entity (MCE)

State of Massachusetts

- MA sends the provider data and client data to Sandata.
- MCE and MA monitor provider compliance and coordinate actions for non-compliance
- Interprets and applies the CMS EVV requirements into State requirements

Managed Care Entities (MCE)

- MCEs provide authorizations to providers
- MCEs can monitor their providers' visit data in EVV Aggregator
- MCE and MA monitor provider compliance and coordinate actions for non-compliance
- Providers continue to send claims/billing to MCEs for payment

Sandata

- Administrator of the Sandata EVV System and the Sandata EVV Aggregator
- Providers capture EVV visits in Sandata or in their Alt EVV system and visit data is sent to EVV Aggregator
- Providers view reporting, EVV Aggregator

Next Steps

Next Steps

ENGAGE:

- Look for upcoming EVV communications from EOHHS, HHAeXchange, and your contracting entity

LEARN:

- Stay updated on the EVV implementation on the Mass.gov EVV website
- Check out Sandata Learn and Sandata On-Demand materials (including Replays!)

ATTEND:

- Have more questions? Come back for another info session.
- Keep an eye out for training opportunities

REACH OUT:

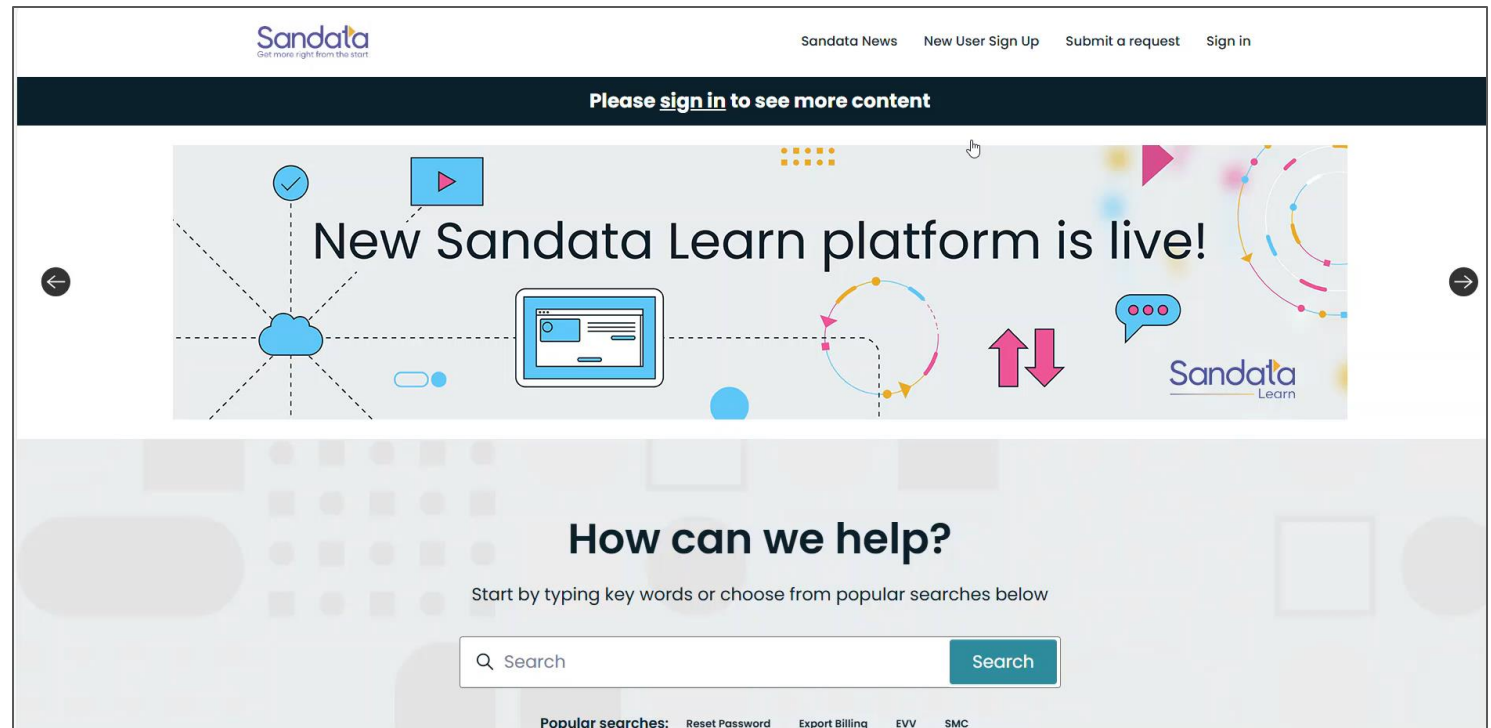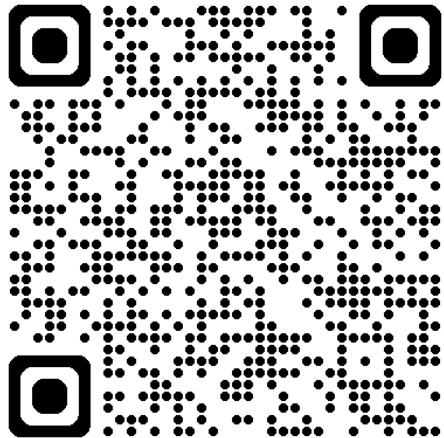- Ask any questions by reaching out to the EVV mailbox: EVVfeedback@Mass.gov

Need Help?

Need to Contact Sandata Support?

Please ensure each user is signed up for Sandata On-Demand to view and submit support tickets!
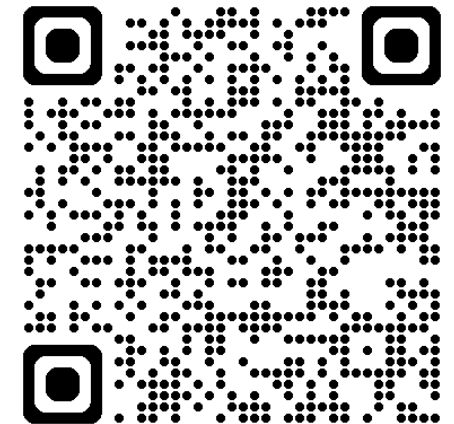
- **Note**: Ensure that the email address used for registration matches the email used for Virtual Gateway and Sandata EVV.

Submitting a Support Request

1. Navigate to [Sandata On Demand](#).

2. Make sure to click **Sign In.**

3. Once signed in, click **Submit a Request** and select from the form dropdown for more information.

4. Fill out the description and attach any pertinent information, screenshots, logs, etc…

5. Click **Submit**; you will receive a confirmation email with the ticket number of your request.

Contacts and Resources

Issue	Who to Contact
General questions about the MA-EOHHS program	Email EVVfeedback@Mass.gov. or visit the MA-EOHHS EVV website for more information.
Assistance with your Provider ID and Service Location (PID/SL)	Contact the MassHealth Customer Service for Providers at 800.841.2900
Assistance with Single Sign-On (SSO) credentials and/or the User Request Form (URF)	Contact the Virtual Gateway Customer Service Phone at 800.421.0938 or reference the Virtual Gateway Business Login User Reference Guide.
Technical help with the Sandata EVV system, EVV Aggregator, Sandata Learn/Training or Alt EVV Specification	Contact Customer Support through **Submit a Request** via Sandata On-Demand. You may also call the Customer Support Line at 833.511.0164.

Common Managed Care Entity Issues & Resources

Issue	Who to Contact
Error with client and provider data	Email EVVfeedback@Mass.gov or visit the MA-EOHHS EVV website for more information.
Questions on claims/authorization	Contact your Managed Care Entity
Questions on compliance policies	Contact your Managed Care Entity
Questions on viewing client and provider visit data in the EVV system	Contact Customer Support through **Submit a Request** via Sandata On-Demand. You may also call the Customer Support Line at 833.511.0164.

Additional Resources

- [Learn about Electronic Visit Verification](#)
- [Massachusetts EVV Service Code Listing](#)
- [Massachusetts (EOHHS) Payer Program Information](#)
- [EVV Provider Self-Registration Portal](#)
- [Vendor Test Clients and Alt EVV Technical Specifications](#)
- [Massachusetts (EOHHS) Previously Recorded Webinars](#)

Questions?