



Ohio Agency Provider Checklist for Sandata Electronic Visit Verification

This checklist will help you:

1. Access required training.
2. Register in the Sandata EVV system.
3. Add EVV System Users.
4. Set up your Recipients.
5. Set up your Direct Care Workers.
6. Share training resources with your Direct Care Workers.

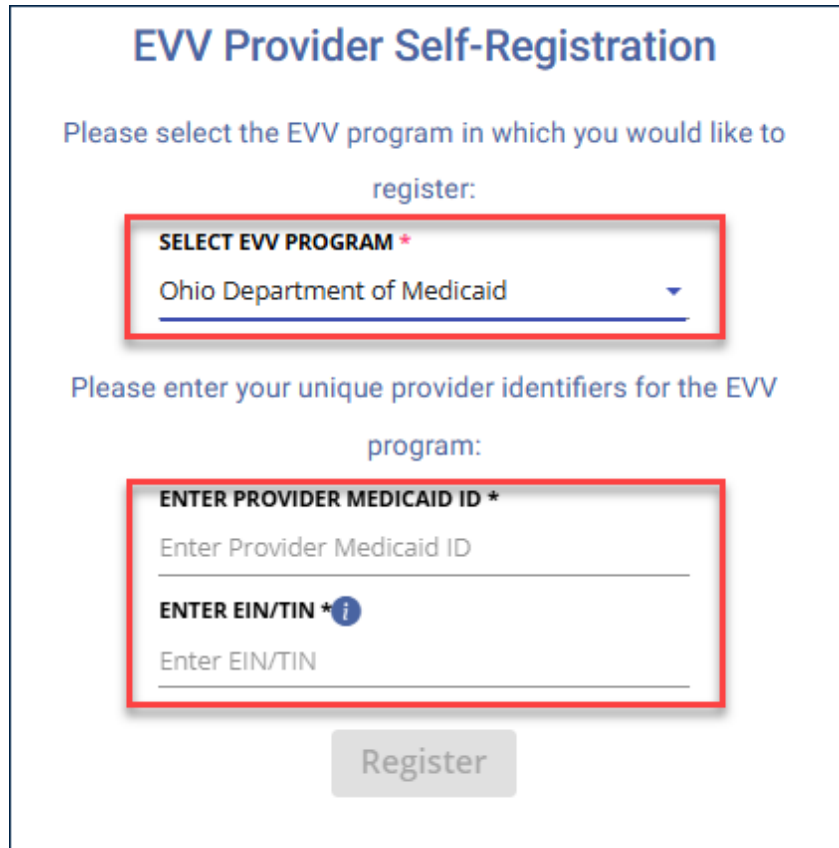
Step 1: Take the Ohio Department of Medicaid Agency Course in Sandata Learn.

- ☐ Go to www.sandatalearn.com. Use the email you use for your OH|ID on the sign-up page. In the form, choose Agency Admin/Manager, Ohio, and Agency EVV. Note: enter 11111 in the Medicaid Provider ID field if you don't know or haven't received your official provider ID yet
- ☐ Take the Ohio Department of Medicaid (ODM) Agency Course. It will prepare you to be successful in Sandata EVV.
- ☐ Upload your course completion certificate into the [PNM portal](#) using your OH|ID. Follow [these instructions](#).

Upon receiving your Provider Medicaid ID via email, proceed to Step 2.

Step 2: Register as a New Provider.

- ☐ Register in the [Sandata EVV Provider Registration Portal](#). Choose Ohio Department of Medicaid for the EVV Program, then enter your Provider Medicaid ID and EIN.



EVV Provider Self-Registration

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

SELECT EVV PROGRAM *

Ohio Department of Medicaid

Please enter your unique provider identifiers for the EVV program:

ENTER PROVIDER MEDICAID ID *

Enter Provider Medicaid ID

ENTER EIN/TIN * *i*

Enter EIN/TIN

Register

Step 3: Register in eTRAC and download your welcome letter.

- ☐ Register and log into [eTRAC](#) following these [instructions](#).
- ☐ Download your Welcome Kit Letter from eTRAC.

Step 4: Log into Sandata EVV.

- ☐ Go to the Sandata EVV login page via [Sandata EVV](#).
- ☐ Click "Log in with OH|ID" and sign in using your OH|ID.

Once you are signed in, your EVV account number will appear in the top right corner of the screen.

Step 5: Set Up Sandata EVV Office Staff System Users.

- ☐ Create office staff users in Sandata EVV. This [video](#) will help you.

Step 6: Set Up Recipient Records in Sandata EVV.

- ☐ Start adding Recipients. Watch this video in full: [Adding Recipients Start to Finish](#)

Step 7: Set Up DCW/Employee Records.

- ☐ Begin adding Direct Care Workers. Follow [these steps](#) and be sure to enable mobile app access.

Train your caregivers on using the Sandata Mobile Connect app to capture visits. See the [Ohio DCW Video Library](#)

For more help, use the Ohio training guide inside the EVV portal, or go to [Sandata On-Demand](#) for training videos and user guides.

