

Our Webinar Will Begin Shortly

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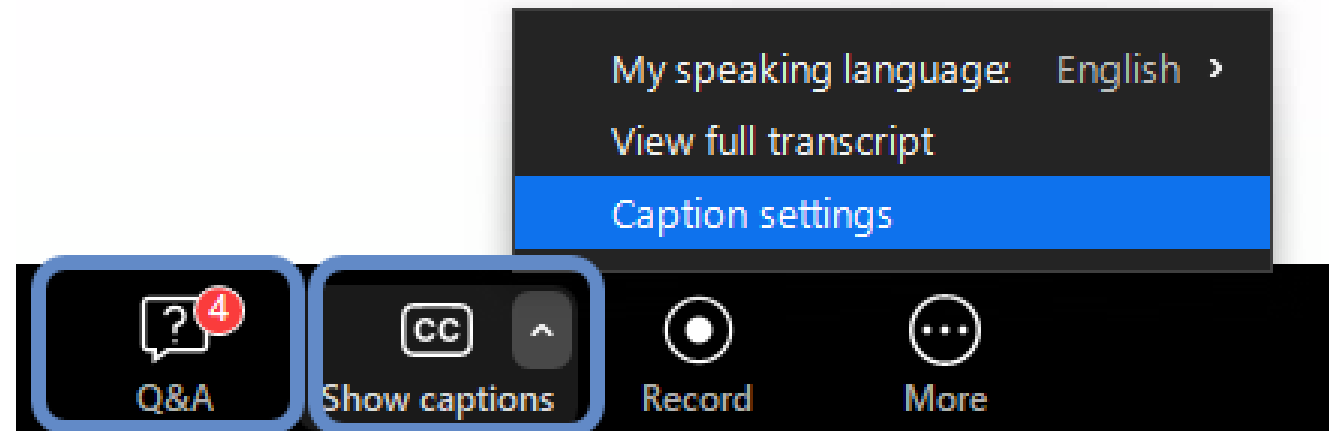


Accessibility Options

Enabling Closed Caption



- This webinar is being recorded. We will email the recording and slides after the session.
- Your camera and mics are turned off.
- Q&A will be answered throughout the presentation. Please submit your questions in the Q&A box by selecting the Q&A button at the bottom of the screen to pop out this box.
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Meet the Trainer!



Alejandra Cordova



- **Role: Sponsored Provider Training Specialist**
- **Tenure at HHAeXchange: 2 years**
- **Areas of Expertise: Sponsored Training**
- **Fun Fact: I'm obsessed with Buc-ee's!**

Mastering Data Entry

November 2025

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This training covers the Recipient and Direct Care Worker (DCW)/Direct Support Professional (DSP) modules, focusing on how to manage records and information for both.

Who should take this training?

Those whose role it is to enter data information regarding your Recipients and DCW/DSP records.

Alt EVV providers, will manage recipient and DCW/DSP records in their Alt EVV system which is then sent to Sandata EVV. For additional support on entering these records, please contact your Alt EVV vendor.

Sandata Standard System Terminology

Corresponding Terminology

CONTRACT / PAYER	<ul style="list-style-type: none"> – FFS – HHS 	<ul style="list-style-type: none"> – MCO – State 	<ul style="list-style-type: none"> – Plan
Recipient	<ul style="list-style-type: none"> – CDS Employer – Consumer 	<ul style="list-style-type: none"> – Patient – Client 	<ul style="list-style-type: none"> – Participant – Beneficiary – Individual
DCW/Employee	<ul style="list-style-type: none"> – Aide – Homecare Aid – Homecare Worker 	<ul style="list-style-type: none"> – Worker – Direct Support Professionals (DSP) – Service Provider – Participant-directed provider 	<ul style="list-style-type: none"> – Attendant – Caregiver – Non-Agency (Independent) Provider – Direct care worker
AGENCY / PROVIDER	<ul style="list-style-type: none"> – FMSA – Vendor 	<ul style="list-style-type: none"> – Program Provider – Non-Agency (Independent) Provider – Participant-directed Providers 	<ul style="list-style-type: none"> – AGE-certified provider – Agency provider
COORDINATOR	<ul style="list-style-type: none"> – Care Coordinator – Case Coordinator 	<ul style="list-style-type: none"> – Service Coordinator – Care Types 	<ul style="list-style-type: none"> – Case manager
UNITY NUMBER	<ul style="list-style-type: none"> – EMPI – Master Patient Number 	<ul style="list-style-type: none"> – Shared Patient Number 	
SECONDARY IDENTIFIER	<ul style="list-style-type: none"> – MPI – Promise Code 		



Objectives of Today's Training

You will be able to:

- Manage Recipient profiles.
- Locate and enable EVV settings in Sandata EVV.
- Filter and export data for recipient and DCW/DSP reporting (agency providers only).
- Manage DCW/DSP profiles (agency providers only).
- Clock in and out using SMC or TVV.



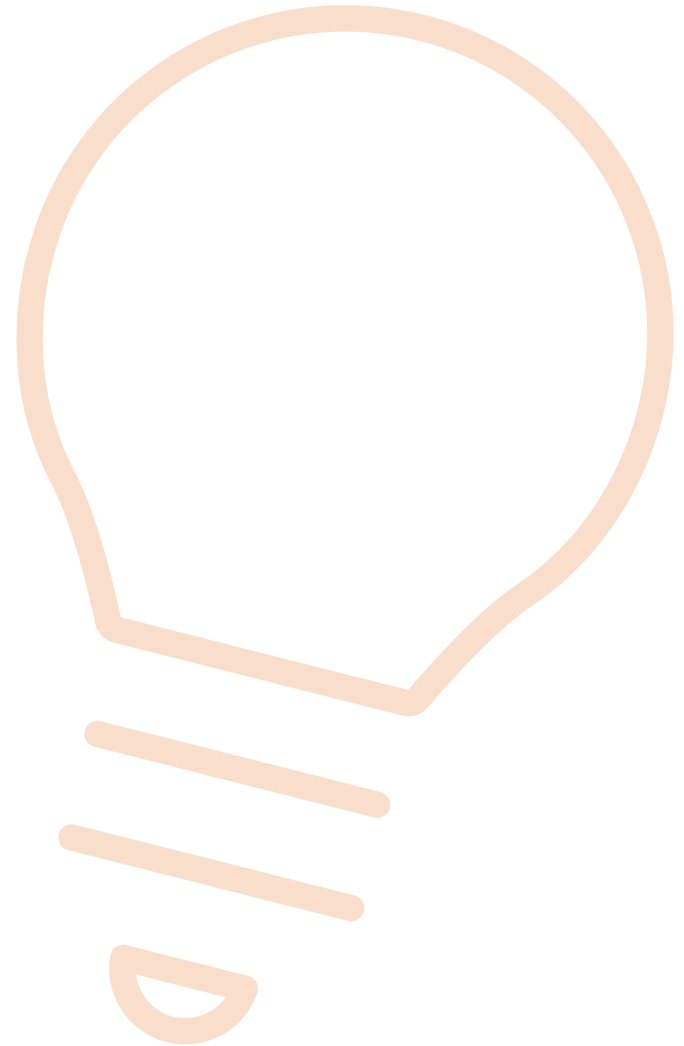
Knowledge Checks

You'll see these throughout the presentation!



What's the name of the presenter of this webinar?

- A. George
- B. Alejandra
- C. Bill
- D. Ashley













Agenda

- EVV Overview
- Setting Up Recipient Profiles
- Creating DCW/DSP/Independent Provider Profiles (Agency Only)
- Exporting Data
- EVV Checkpoints
- Visit Capture
- Key Takeaways
- Support Resources
- Q & A

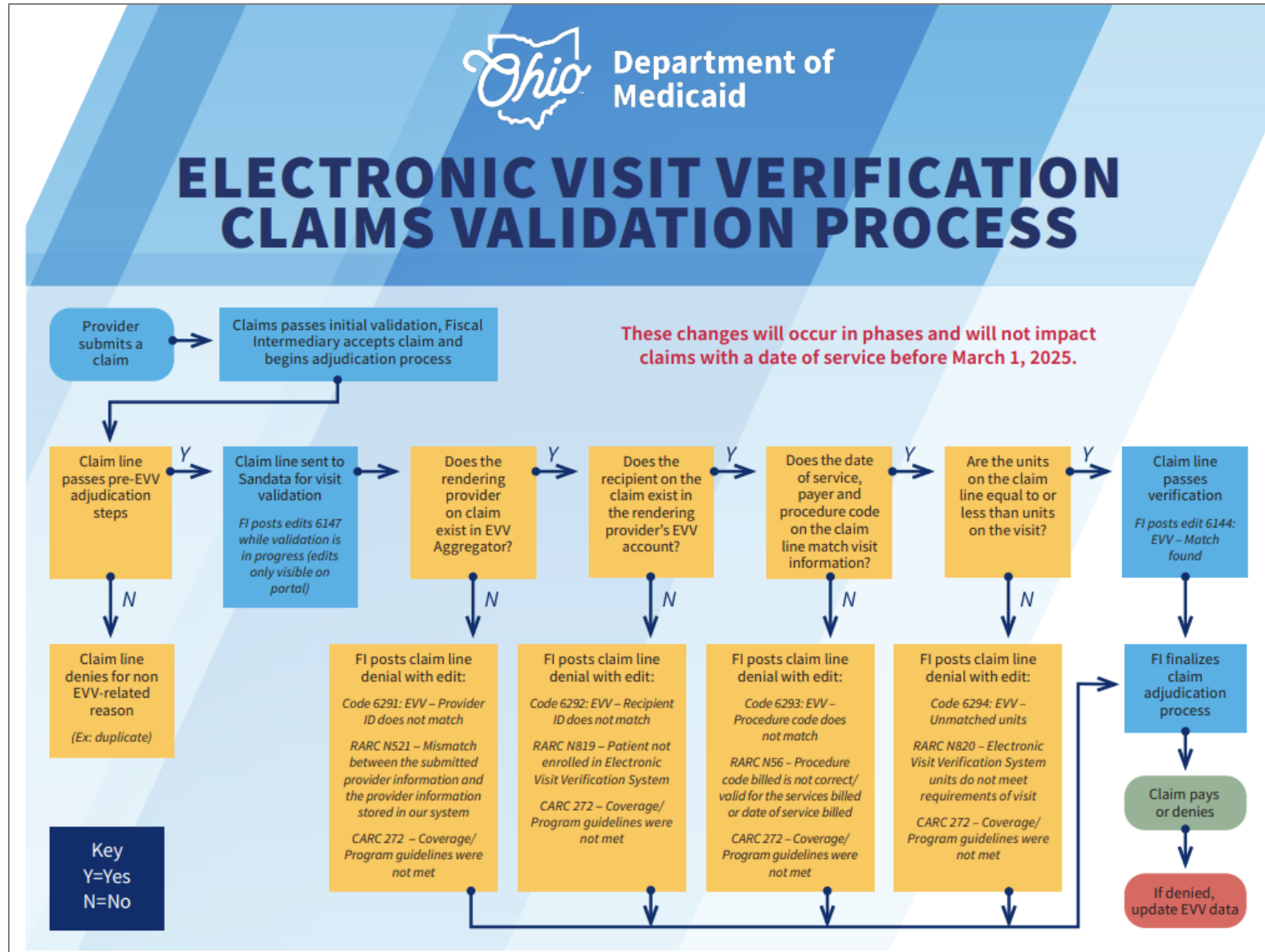


EVV Claims Adjudication Phases



 Department of Medicaid		EVV Claims Adjudication Phases				
PHASE 1 March 1, 2025	PHASE 2 June 1, 2025	PHASE 3 June 1, 2025	PHASE 4 August 1, 2025	PHASE 5 October 1, 2025	PHASE 6 January 1, 2026	PHASE 7 March 1, 2026
Billed to ODM FFS		Billed to Next Gen MCEs		Billed to DODD	Billed to ODM or AGE	Billed to MyCare
HOME HEALTH SERVICES	PRIVATE DUTY NURSING, NURSE ASSESSMENT AND CONSULT	HOME HEALTH SERVICES	PRIVATE DUTY NURSING NURSE ASSESSMENT AND CONSULT	10, Level 1, SELF WAIVER PROGRAM SERVICES	OHIO HOME CARE, PASSPORT WAIVER SERVICES	HOME HEALTH PDN, NURSE ASSESSMENT AND CONSULT, WAIVER SERVICES
						
*Based on claim line date of service.						

Electronic Visit Verification Claims Validation Process

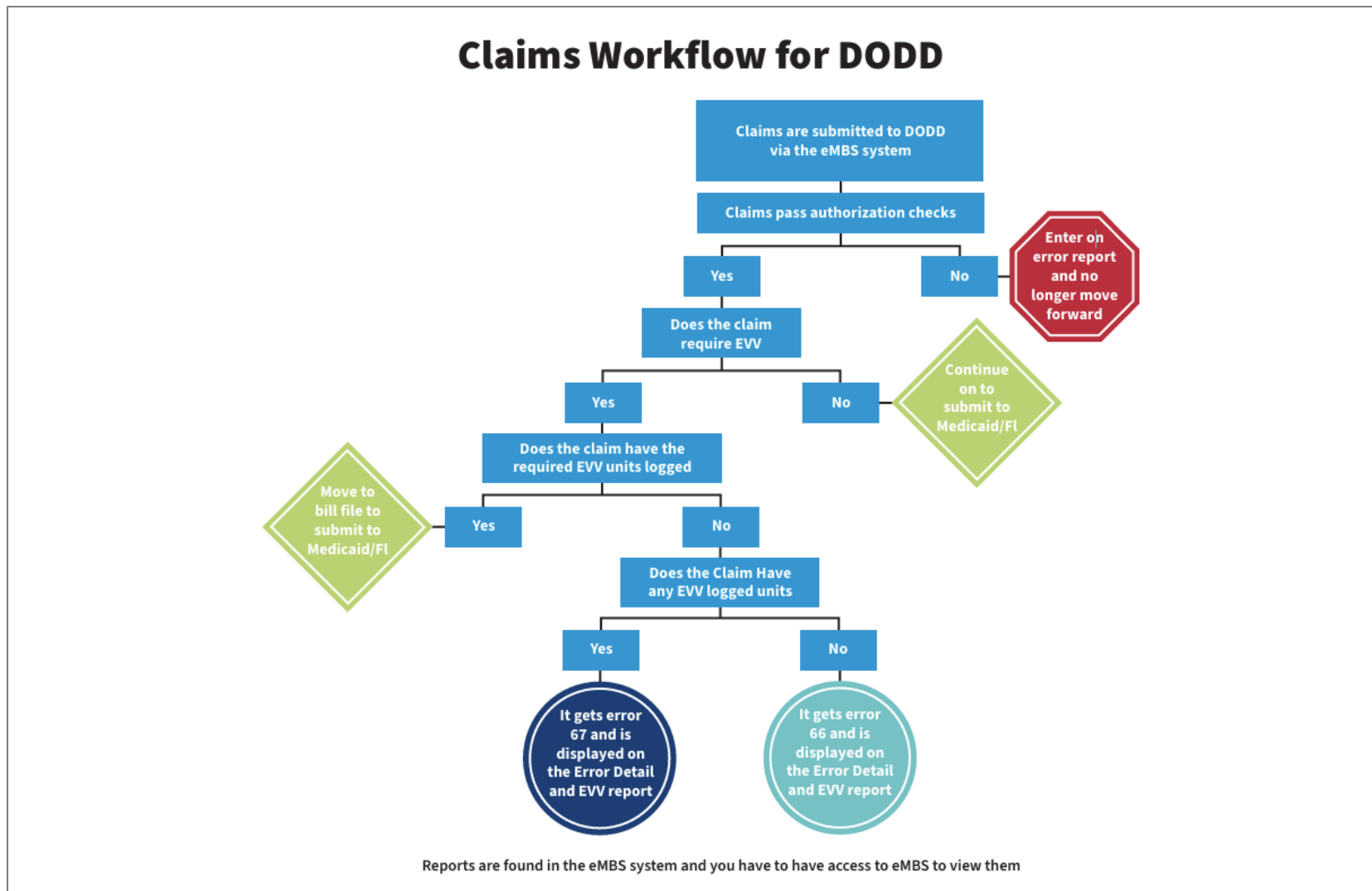


> List of Services (Phase 1-4)



Phase 1: 3/1/2025 • Billed to ODM FFS (SP)	Phase 2: 6/1/2025 • Billed to ODM FFS (SP)	Phase 3: 6/1/2025 • Billed to Next Gen MCE's (SP)	Phase 4 : 8/1/2025 • Billed to Next Gen MCE's (SP)
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)	T1000 - State plan private duty nursing T1001 - State plan T1001_U9 – RN Consultation (T1001)	G0156 - Home health aide G0151 - Home health physical therapies G1052 - 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)	T1000 - State plan private duty nursing T1001 - State plan T1001_U9 – RN Consultation (T1001)

Claims Workflow for DODD



List of Services Billed to DODD (Phase 5)



- All nursing codes billed directly to Medicaid require EVV.
- Homemaker personal care (including overtime and longevity add-on codes).
- All 15-minute unit direct care residential based service codes EXCEPT on-site-on-call service codes.

Ohio Department of Developmental Disabilities

Waiver Services



Subject to EVV

Homemaker/Personal Care (HPC)

Participant-Directed HPC

Waiver Nursing

Nursing Consultation

Nursing Assessment

Residential Respite (15-minute units)



NOT Subject to EVV

Shared Living

Services billed per diem (including per diem
Residential Respite)

Facility-based services

Services, subject to EVV, provided by live-in
caregivers (with approved exemption)

For a comprehensive list of services requiring EVV under DODD waivers, please refer to the [eMBS Service Codes document](#).

EVV Overview

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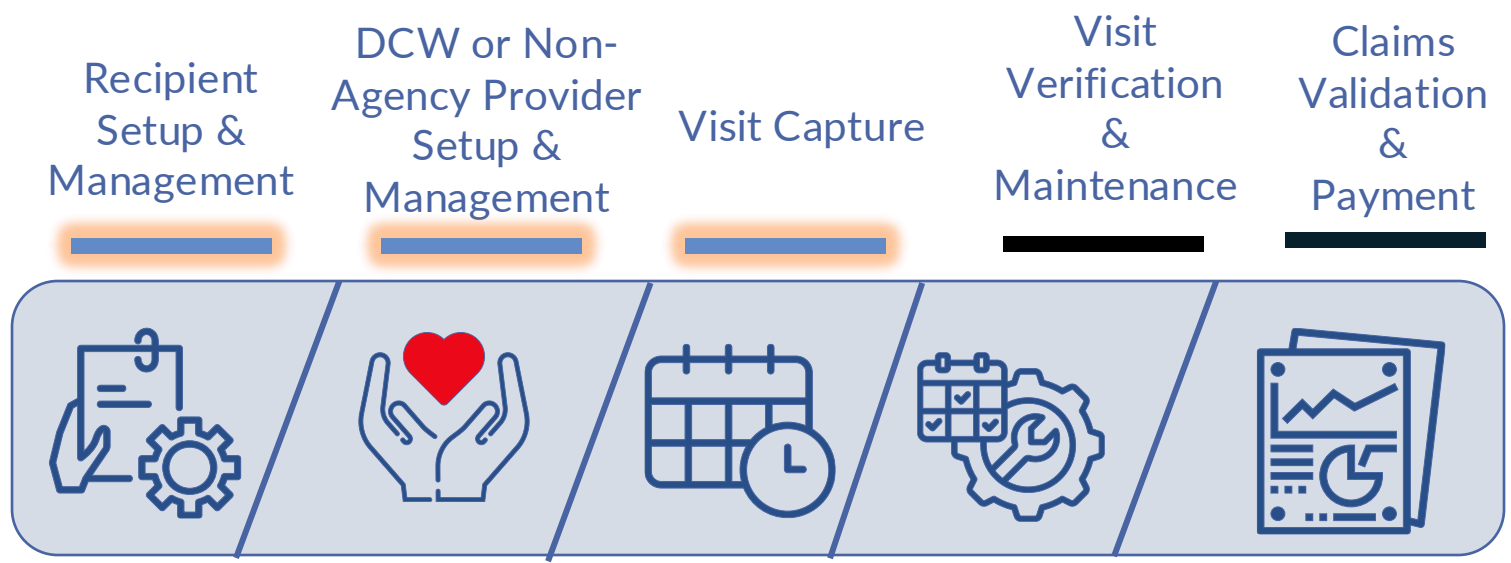
Electronic Visit Verification Overview



The 21st Century Cures Act requires providers to use Electronic Visit Verification (EVV) for Medicaid-paid personal care and home health services.

Agency Providers/Non-Agency (Independent Providers) and or Participant-Directed Providers need to record their visits electronically to confirm services are provided on time to the recipient, by the right provider, and in the right amount.

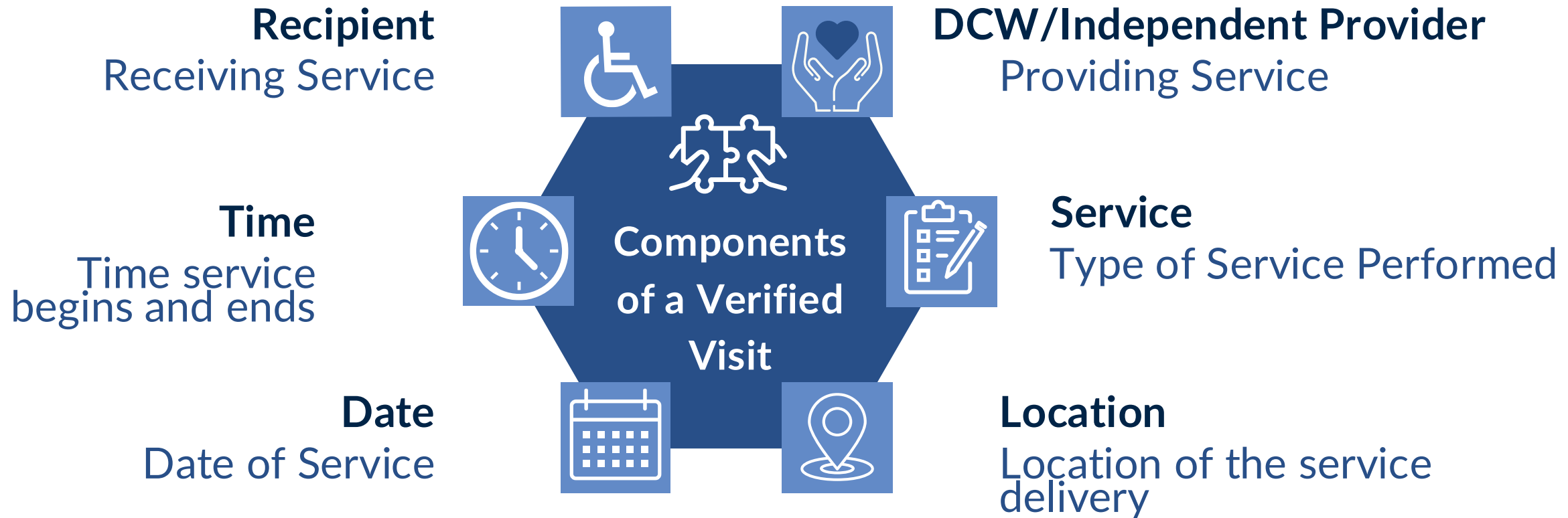
The first part of this training will help you enter data for your Recipient and DCW/DSP accurately. This ensures visits are tracked, improves accountability, reduces errors, and helps your agency follow the rules.



> Visit Capture



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

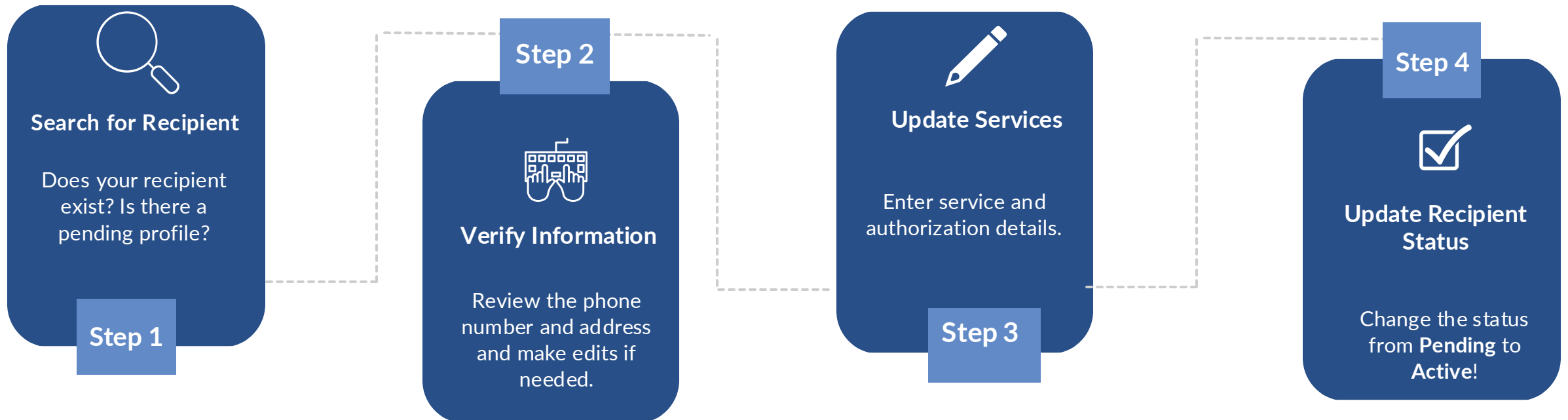




Setting up Recipient Profiles



Steps to Setting up a Recipient



Step 1: Verify Information

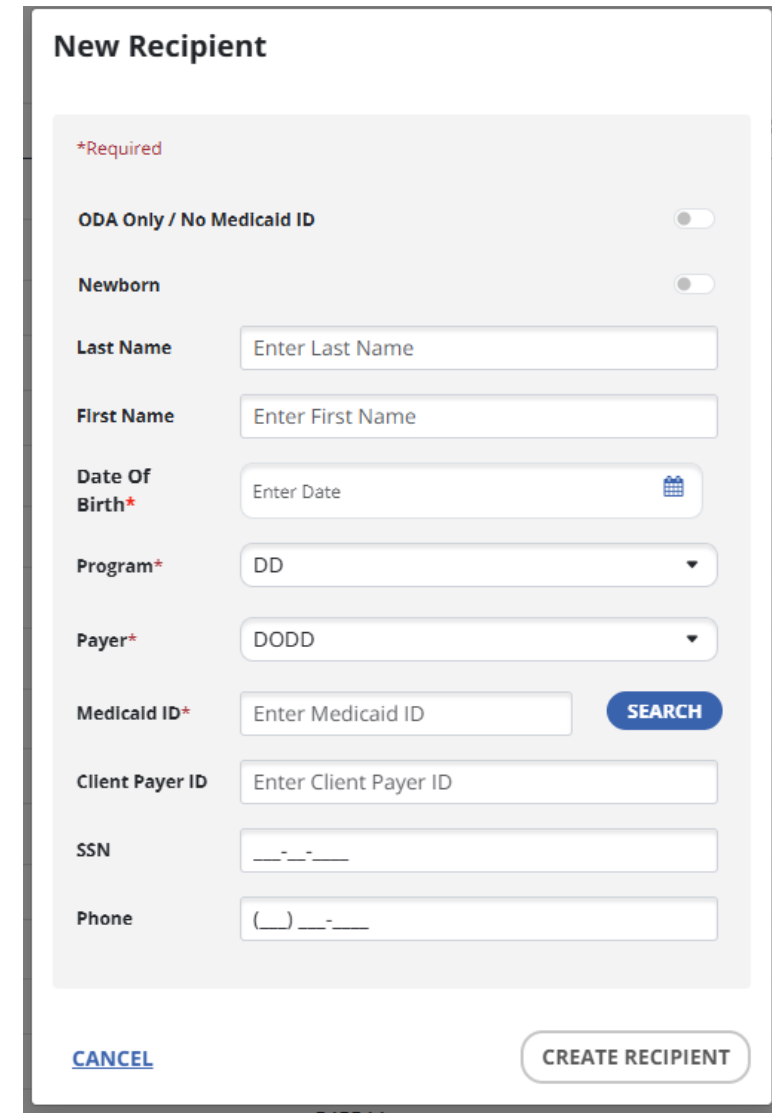


1. Navigate to **Recipient > Recipient Management**.
2. In search bar, type in Recipient Name; click enter.

Does the recipient appear in list view? Is there a pending profile?

If no, follow steps below to create recipient.

1. Select **Create Recipient**.
2. Fill in required fields, which include: **Date of Birth (DOB), program, Medicaid ID, and payer**.
3. Select **Search**. If this recipient exists in the MMIS, the first and last name will automatically populate.
4. Select **Create Recipient**.



The screenshot shows the 'New Recipient' form. At the top, it says '*Required' in red. Below this are two toggle switches: 'ODA Only / No Medicaid ID' and 'Newborn', both currently turned off. The form contains several input fields: 'Last Name' (placeholder: Enter Last Name), 'First Name' (placeholder: Enter First Name), 'Date Of Birth*' (placeholder: Enter Date, with a calendar icon), 'Program*' (dropdown menu showing 'DD'), 'Payer*' (dropdown menu showing 'DODD'), 'Medicaid ID*' (placeholder: Enter Medicaid ID, with a blue 'SEARCH' button to its right), 'Client Payer ID' (placeholder: Enter Client Payer ID), 'SSN' (placeholder: __-__-__), and 'Phone' (placeholder: () __-__). At the bottom left is a blue 'CANCEL' link, and at the bottom right is a blue 'CREATE RECIPIENT' button.

Step 2: Verify Information

1. Recipient Profile screen populates.
2. Review Recipient personal identifiers, including addresses and phone numbers.
3. If you are editing/updating profile, ensure you select **Save** at the end.

Recipients / Edit Recipient

< BACK Doe, Jane MyC | Active

Recipient ID: 8 | Medicaid ID: -- | Main Address: 101 Main Street | Main Emergency Contact: -

Personal* Program Schedules

Identifiers

Recipient ID	8	Medicaid ID	-
SSN	-	Agency ID	1111111

Personal Information

Recipient Name	Jane Doe	Newborn	No
Date of Birth	-	Gender	-
Language	English		

Addresses | Phone Numbers ADD

Home Main Address Billing

Step 3: Update Services

1. Navigate to **Program** tab.
2. Add Services for recipient; fill out required fields, including **Service**, **Start** and **End Date**.
3. Add EVV Authorizations for recipient; fill out required fields, including **Payer**, **Service**, **Event Code**, **Format**, and **Start** and **End Date**.

[Creating Recipient Authorizations](#)

[ODM EVV Program and Service Code Guide](#)



Service Details

* Required

Service

Service*

Select Service

Start Date *

01/11/2022

End Date

Enter End Date

CANCEL

SAVE AND ADD ANOTHER

SAVE

Authorization Details

* Required

General Info

Payer*

DODD

Authorization Number

AMP20250224XXXXXXXX

Service*

Select Service

Modifiers:

1:

2:

3:

4:

Event Code*

Select Event Code

Format*

Select Format

☐ Voiced

Date Range

Start Date*

02/24/2025

End Date*

Set End Date



Step 4: Update Status



1. Navigate to **Program** tab.
2. Update Status to **Active**.

The screenshot shows a web form titled "Payer Details" with the following fields:

Payer Name: ODA	Medicaid ID: -
Rank: 1	
Recipient Payer ID: -	Group Number: -
Start Date: -	End Date: -

On the right side of the form, there is a dropdown menu for "Status". The current selection is "Pending". The dropdown menu is open, showing the following options:

- Pending
- Active
- On Hold
- Discharged
- Cancelled



Q Navigate Modules

Dashboard

Recipients

DCW/Employees

Scheduling

Visit Maintenance

Reports

XREF

Security

Messaging

Visit Counts By Exceptions

Visit Counts By Status

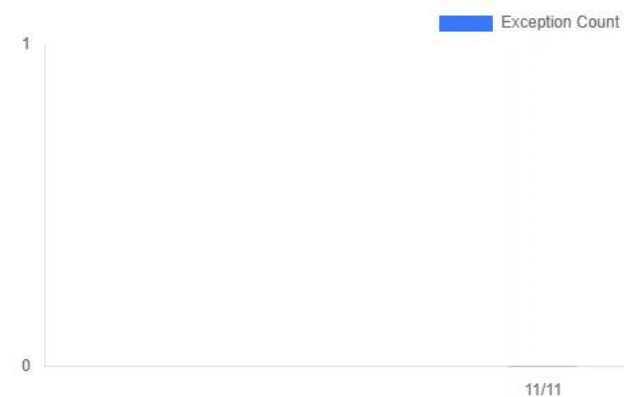
Date Range

Today

Visit Exceptions

Unknown Recipients	0
Unknown DCW/Employees	0
Visits Without Any Calls	0
Visits Without In-Calls	0
Visits Without Out-Calls	0
Late In-Call	0
No Show Exception	0
Missing Service	0

Visit Exception Count Per Day



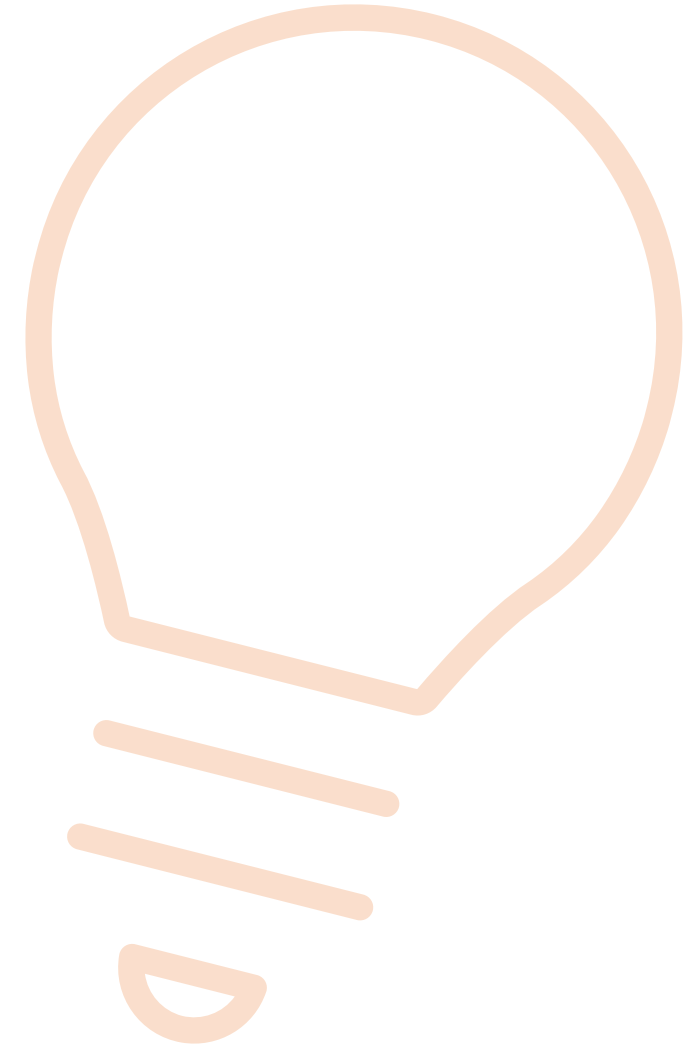
Need some guidance? Use this ^x
OH User Training Guide!

Knowledge Check-Recipient Profile



Which is NOT required to create a Recipient record ?

- A. Medicaid ID
- B. Date of Birth
- C. Payer
- D. Last Name and First Name



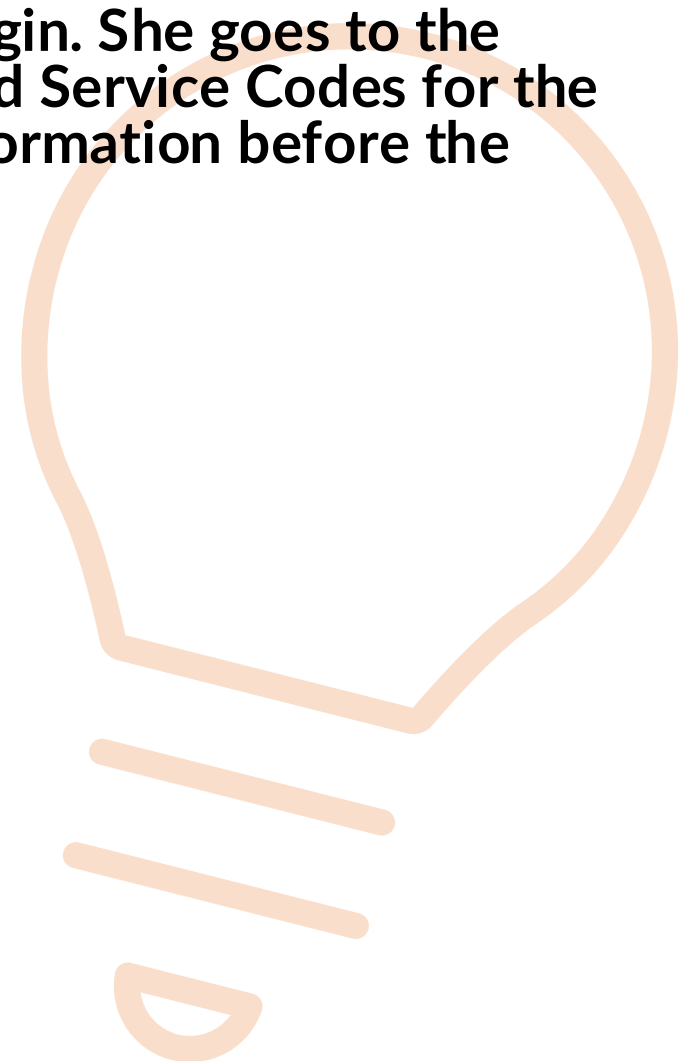


Knowledge Check-Recipient Authorizations



Maria is reviewing a recipient's record before services begin. She goes to the Program tab to check the EVV Authorizations, Payers, and Service Codes for the recipient. Why is it important for Maria to review this information before the provider delivers services?

- A. To update the recipient's contact details
- B. To prevent EVV claim errors
- C. To assign caregivers to the recipient
- D. To review visit notes





Creating DCW/DSP Profiles (Agency Only)



Direct Support Professionals: Your DSP/Employee records have been created for you!



- This information has been created for DSP; there is no action for you to create a profile.
- Mobile is enabled by default.
- **Note:** If profile edits are needed, providers will need to update information in the PNM (Provider Network Management) System.
 - Please allow for changes to process then review in Sandata EVV.



Creating DCW/DSP – Agency Providers Only



1. Navigate to **DCW/Employee** module > **Create DCW/Employee**.
2. Fill out all required fields.
3. Toggle mobile access next to mobile user if this DCW/Employee will be using the Sandata Mobile Connect (SMC) App.
4. Select **Create DCW/Employee**.
5. Providers can now edit/add personal information, addresses and personal identifiers.

Visit Counts By Exceptions

Visit Counts By Status

Date Range

Today

Visit Exceptions

Unknown Recipients	0
Unknown DCW/Employees	0
Visits Without Any Calls	0
Visits Without In-Calls	0
Visits Without Out-Calls	0
Late In-Call	0
No Show Exception	0
Missing Service	0

Visit Exception Count Per Day



Need some guidance? Use this^x
OH User Training Guide!



Exporting Data

Exporting Data from List Views



Sandata EVV offers providers the ability to export data. This can be used as a reporting tool when needing to verify your recipients, DCW/DSP's.

Downloadable options include: CSV, Excel, PDF

Sandata
Home Care

Navigation Modules

Dashboard

Recipients

Recipient Management

DCW/Employees

Scheduling

CREATE RECIPIENT

ACCOUNT: 43600- HHA Exchange Training (03/28/2025) - RECORD004@HHAEXCHANGE.COM

LOG OUT

Type here for a quick search...

FILTERS

EXPORT DATA

RECIPIENT	STATUS	PROGRAM	SUPERVISOR	RECIPIENT ID	MEDICAID ID	RECIPIENT PAYER ID	AS OF	SOC	EOC	SERVICES
+ Doe, Jane	Active	MyC		426508			10/02/2025	10/02/2025		S5125, T1019
+ Doe, John	Active	MyCPD		926777			09/29/2025	09/29/2025		T1019
+ HHAeXchange, Harold	Active	DD		262305			10/01/2025	10/01/2025		HPC
+ Sandata, Sandy	Active	SP		538494			03/01/2025	03/01/2025		G0151, G0152, G0156, G0299, G0300

Visit Counts By Exceptions

Visit Counts By Status

Date Range

Today

Visit Exceptions

Unknown Recipients	0
Unknown DCW/Employees	0
Visits Without Any Calls	0
Visits Without In-Calls	0
Visits Without Out-Calls	0
Late In-Call	0
No Show Exception	0
Missing Service	0

Visit Exception Count Per Day



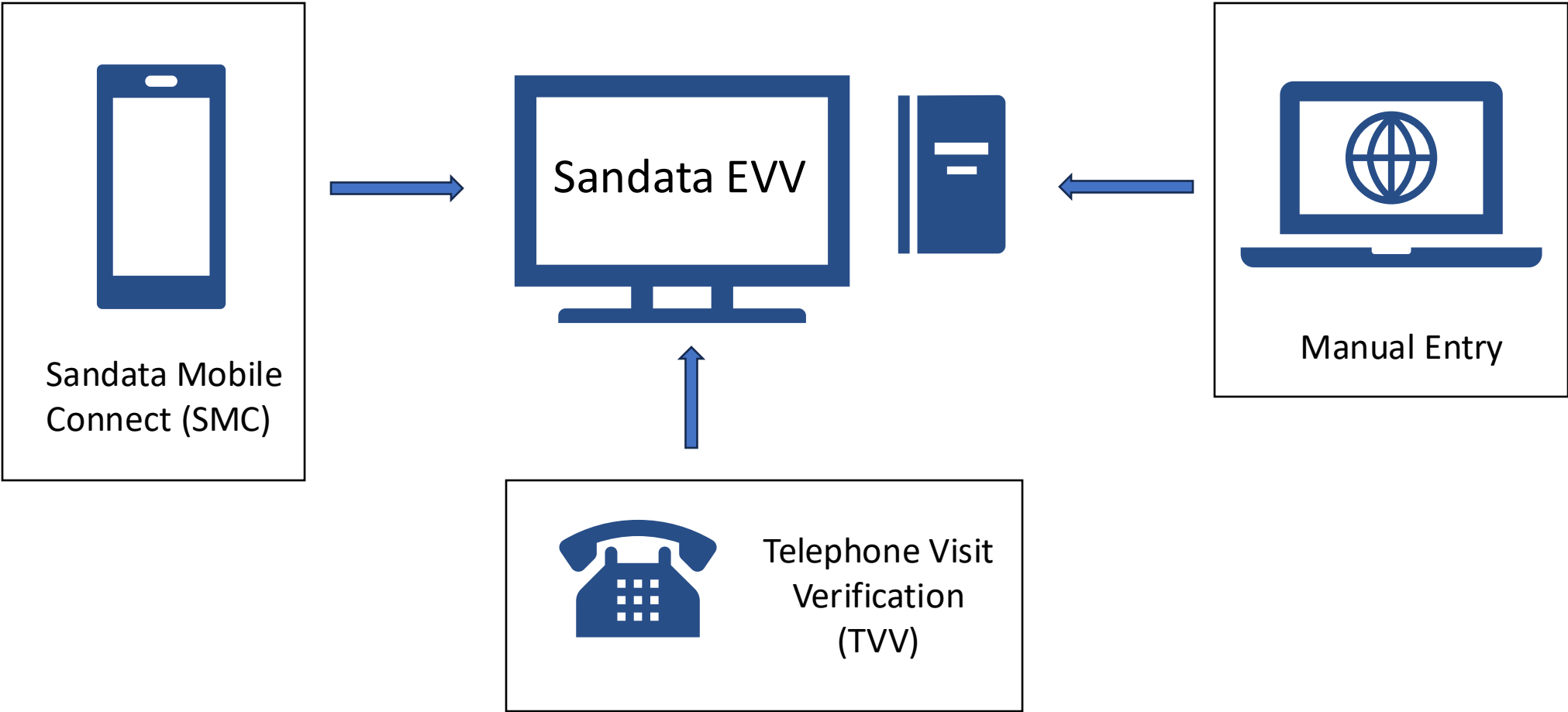
Need some guidance? Use this^x
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EVV Checkpoints

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Visit Capture Methods





EVV Agency Checkpoints

Enable Your Employees to Perform EVV



Depending on your EVV Clock In/Out method, make sure you locate and enable the following:



Enable
Mobile User



Locate the
DCW/Employee
Passcode
(Santrax ID)



Locate
the Sandata
EVV 800 #



Locate the
Recipient ID
or Medicaid
ID



Run Active
DCW/Employees
and
Active Recipients
Report



EVV DSP Checkpoints

Enable Your Employees to Perform EVV



Depending on your EVV Clock In/Out method, make sure you locate and enable the following:



Enable
Mobile User



Locate the
DCW/Employee
Passcode
(Santrax ID) and
TVV Pin



Locate
the TVV #



Locate the
Recipient ID
or Medicaid
ID



Sandata Mobile Connect (SMC)

Enabling Mobile User



SMC logins are created when the DCW/DSP is in the Sandata EVV system and enabled as a **mobile app user**.

Note: Ensure that an email address is listed for employee to receive temporary mobile password!

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*

(231) 555-1234

Email Address

Enter Email Address

☒ Use as main address

☐ Mobile user

+ Add number

CANCEL

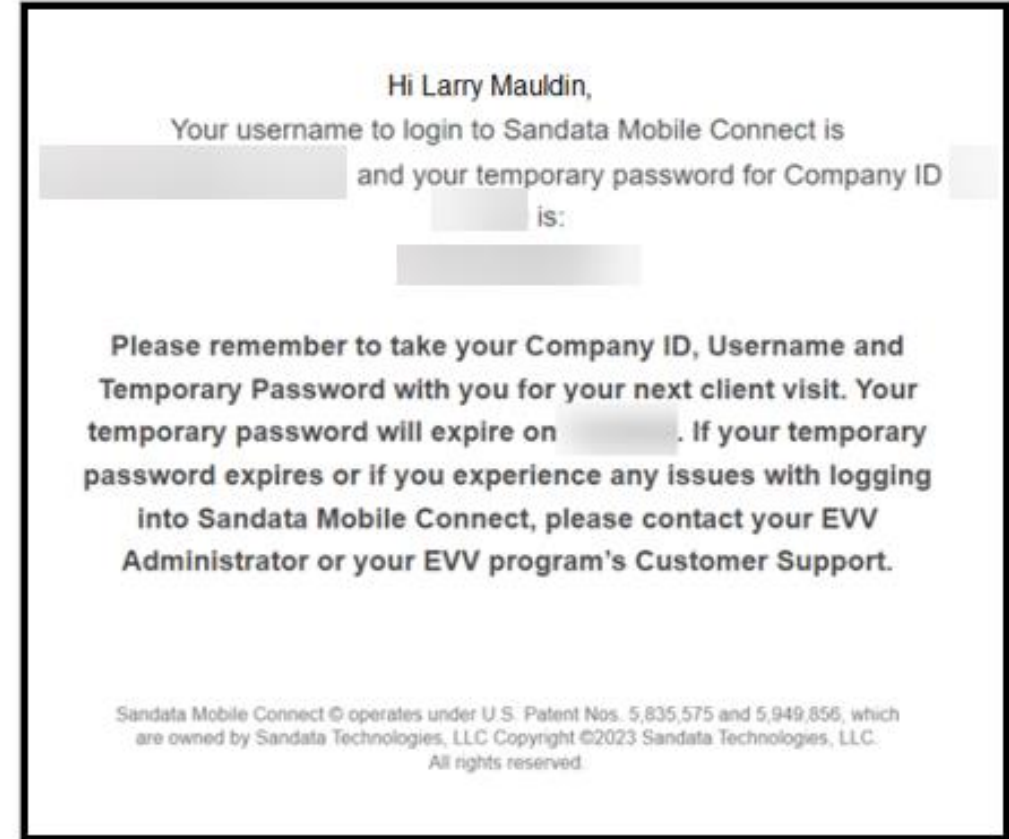
RESET MOBILE USER PASSWORD

SAVE

Email Confirmation to DCW/DSP



- Once set up, the DCW/DSP will receive an email that includes:
 - Username
 - Temporary password
 - Company ID





First Time Log In



Once the DCW/DSP downloads and opens app, they will enter in the information provided in the email to start their visits.

Sandata
Mobile Connect®

roger.brown

.....

2-45567

Remember Me

Sign In

Reset Password

Sandata
Mobile Connect®

s.anderson@eastvalleyhospice.com

.....

East Valley Hospice423178

Marigold Caregivers561234

East Valley Hospice423178

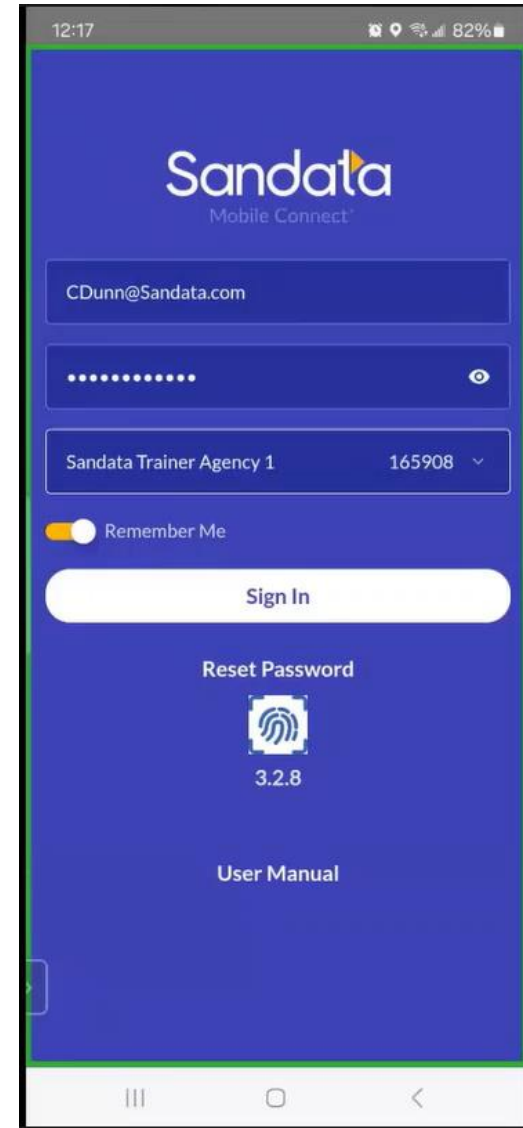
Marigold Caregivers5619817



First Time Log In Demo



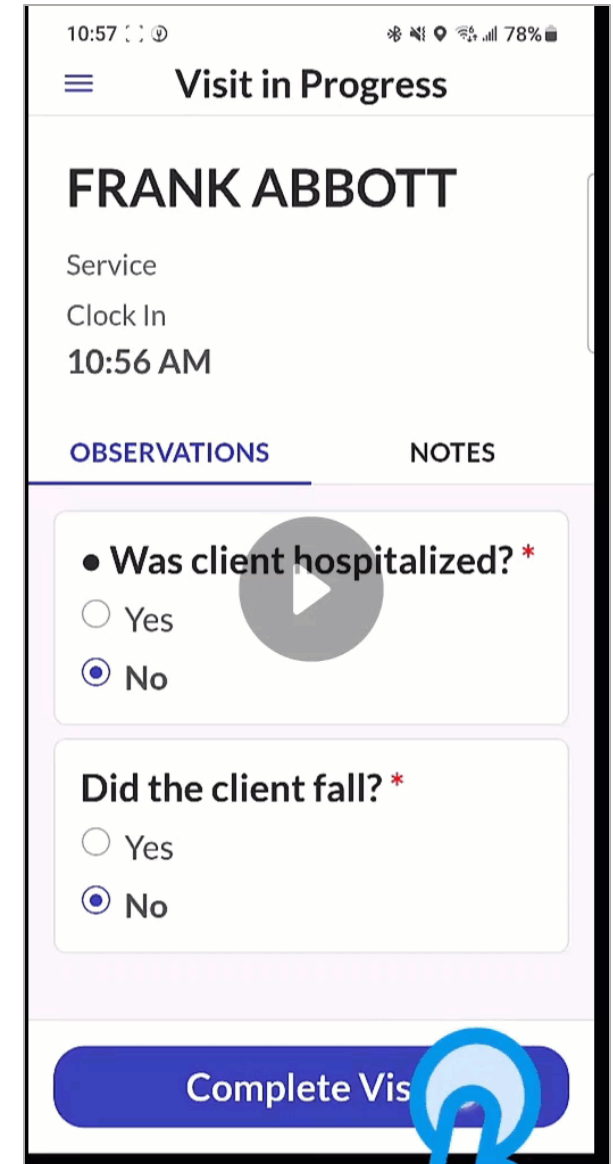
1. From Email, fill in:
 - **Username** (email)
 - **Temporary password**
 - **Company ID**
2. Tap **Sign In**.
3. Create a password using the requirements; tap **Continue**.



Sandata Mobile Connect (SMC)



- SMC can be used from a cell phone or Wi-Fi-enabled device to clock in and out of visits.
- Can work in an 'offline' mode. Visit data will appear once DCW/DSP's device has reconnected to cellular service or Wi-Fi.



10:57 78%

Visit in Progress

FRANK ABBOTT

Service

Clock In
10:56 AM

OBSERVATIONS NOTES

• Was client hospitalized? *

☐ Yes

☒ No

Did the client fall? *

☐ Yes

☒ No

Complete Visit



Telephony Visit Verification (TVV)

- Available as an alternate to the mobile Sandata Mobile Connect App (SMC) call in/call out process.
- When using TVV, the DCW/DSP can call in/call out from any authorized phone number listed in the Recipient record.

Locating DCW/Employee Passcode



If a DCW/DSP will be utilizing TVV for EVV capture, make sure to provide the employee with Santrax ID to successfully call in and call out.

Navigate to DCW/Employee Record > Personal Tab

Note (DSPs): Passcode is equivalent to the TVV Pin.

DCW/Employees / Edit DCW/Employee

[< BACK](#) **Personal** **Family**

DCW/Employee ID: 990000000 | Phone No: () | Email Address: | Main Emergency Contact: --

Personal Schedules


Identifiers



SSN	-	Passcode	
Status	Active	Effective Date	Jun 27, 2024
DCW/Employee ID	990000000	Position	CGV- Caregiver
Hire Date	-	Supervisor	-
National Provider ID	-	Santrax ID	839205

Locating Recipient ID/Phone Line





Providers can locate the Recipient ID and phone number in the Recipient profile to provide to DCW/DSPs for calling in and calling out.

Identifiers 

Recipient ID	748558	Medicaid ID	 299
SSN	-	Agency ID	 299

Addresses | Phone Numbers [ADD](#)

 400 ANYWHERE

 (501) 444-4444

Main Address

...

Visit Counts By Exceptions

Visit Counts By Status

Date Range

Today

Visit Exceptions

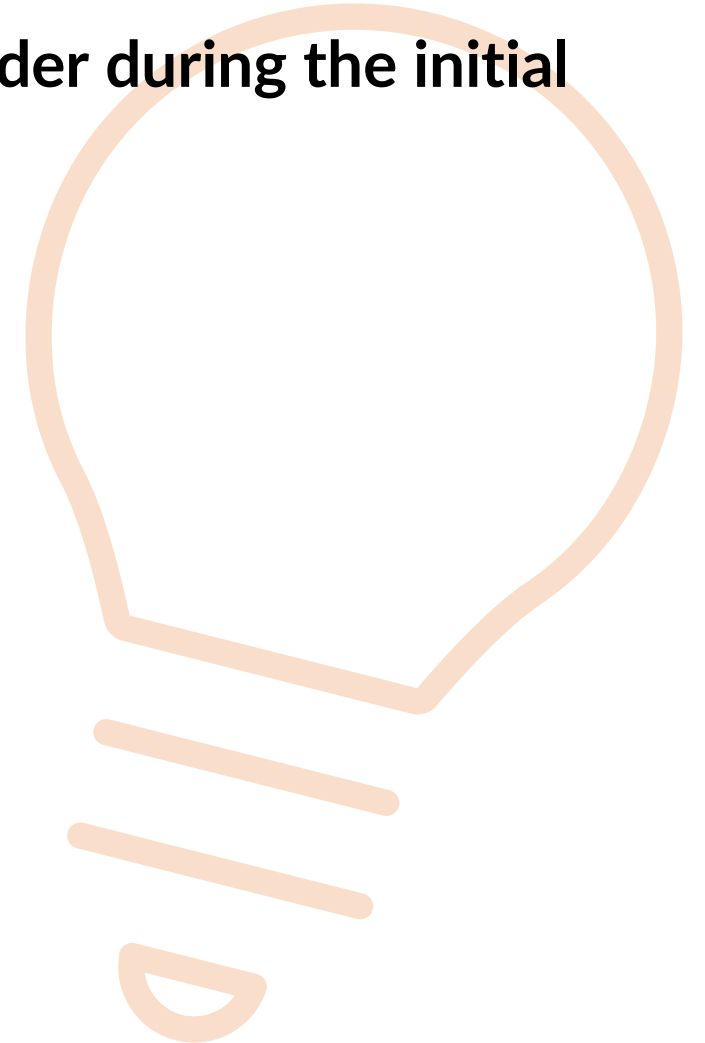
Unknown Recipients	0
Unknown DCW/Employees	0
Visits Without Any Calls	0
Visits Without In-Calls	0
Visits Without Out-Calls	0
Late In-Call	0
No Show Exception	0
Missing Service	0

Visit Exception Count Per Day



What is NOT needed for the DCW/Independent Provider during the initial log in to Sandata Mobile Connect App (SMC)?

- A. Temporary Password
- B. Recipient ID
- C. Company ID
- D. Username





Visit Capture using SMC or TVV

Starting a Visit via SMC App



Option 1: Searching for Recipient ID



- Displays a list of the recipient's authorized services to choose from.
- Less room for visit errors.

Option 2: Start Unknown Visit



- More room for error.
- No specific services in scope.
- Will cause a visit exception.

Starting a Visit with Recipient ID

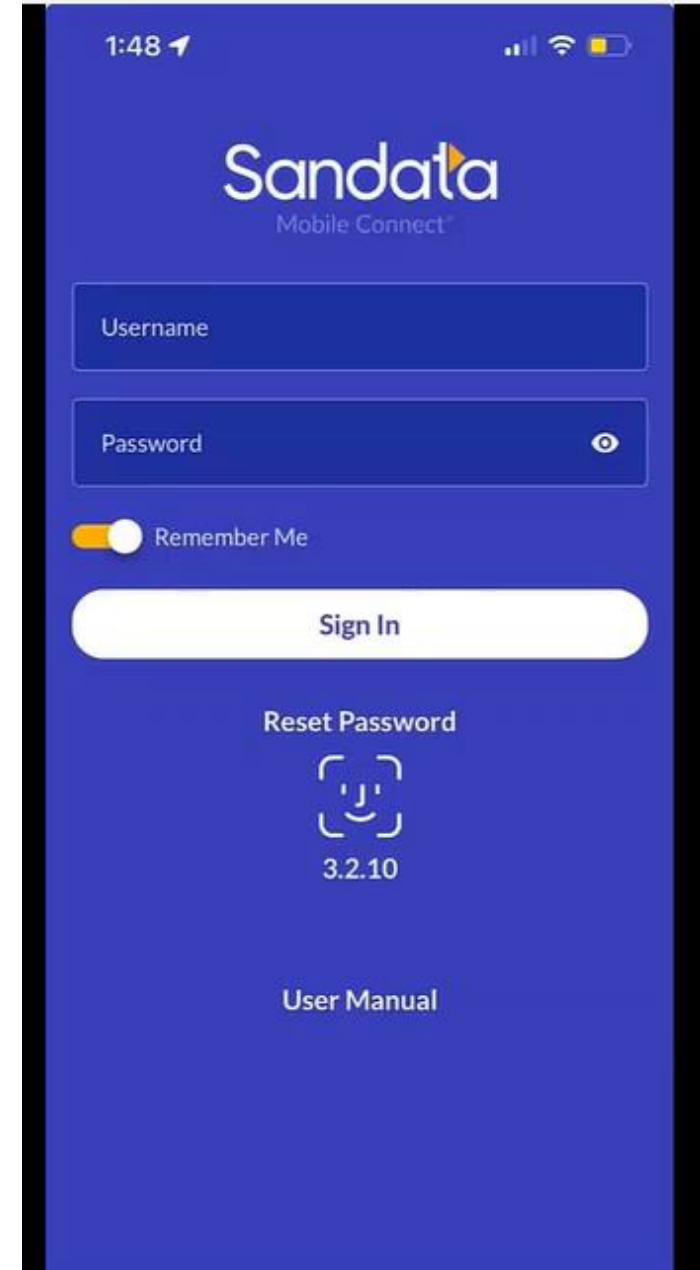


Your DCW/DSP arrives at the home of a recipient authorized to receive services. This DCW/DSP opted to start her visit by searching for the Recipient ID in the SMC app. This method is preferable as it ensures that all the right details (Recipient ID, Service) are linked to the visit, reducing the chances of visit exceptions and helping the visit to match a claim.

Starting a Visit with Recipient ID Steps

1. Log in to SMC app.
2. Tap the **hamburger icon** (≡) > **Recipients**.
3. Enter **Recipient ID** in the Search bar; tap **Search**.
4. Tap **Start Visit**.
5. Select **Service**; tap **Continue**.
6. Select **Location**; tap **Continue**.
7. Tap **Yes** to start visit.

[OH-SMC Video Resource](#)





Start an Unknown Visit



An DCW/DSP was called in to cover a visit for another DSP who called out unexpectedly. When they arrived at the recipient's home, they logged in to the SMC app and enter the Recipient ID provided to them by the office; however, it's not working, or the recipient doesn't appear in the search. Since they are unable to start the visit through the standard method, and services still need to be delivered on time, the DSP decided to use the **Start Unknown Visit** option in the app to clock in and begin care.

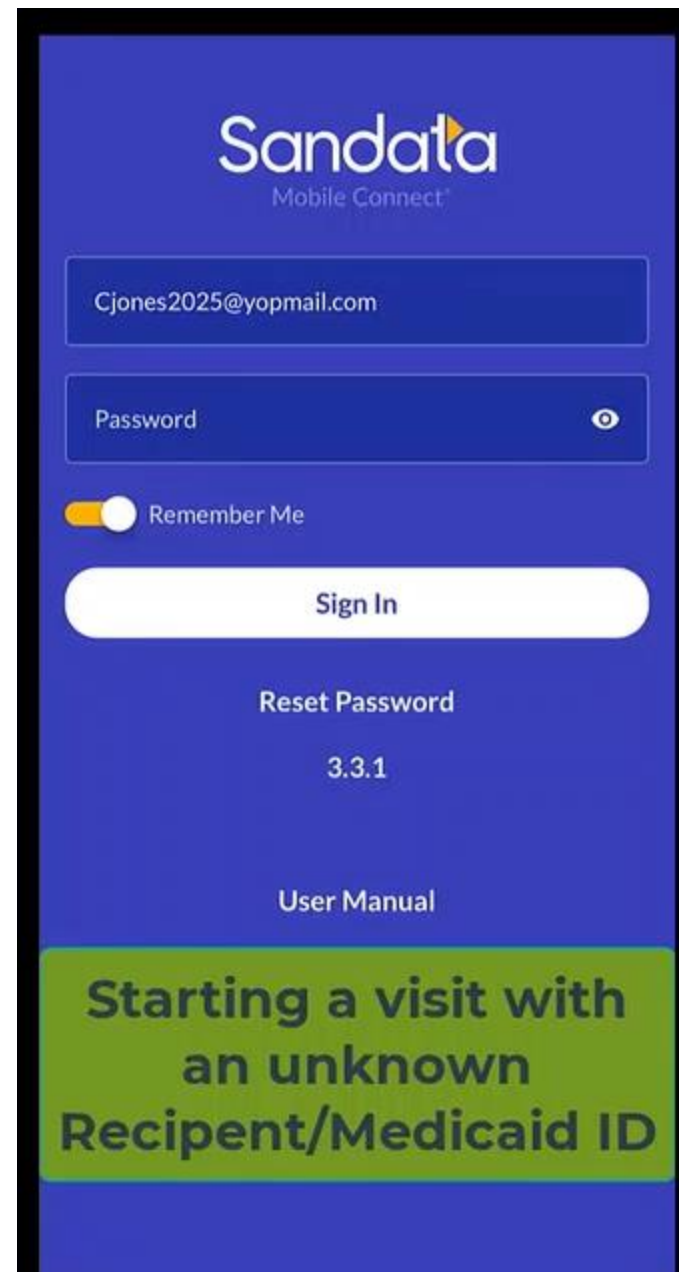
A visit exception will be created and will need to be resolved later by the agency administrator.



Start an Unknown Visit

1. Log in to SMC app.
2. Tap the hamburger icon (≡) > **Recipients**.
3. Tap **Start Unknown Visit**.
4. Enter **First** and **Last** name of recipient.
5. Tap **Start Visit**.
6. Select from the list of **Services**.
 - **Note:** this displays all services codes identified by the state that are in scope.
7. Tap **Continue**.
8. Select **Location**; tap **Continue**.
9. Tap **Yes** to start visit.

[OH-SMC Video Resource](#)

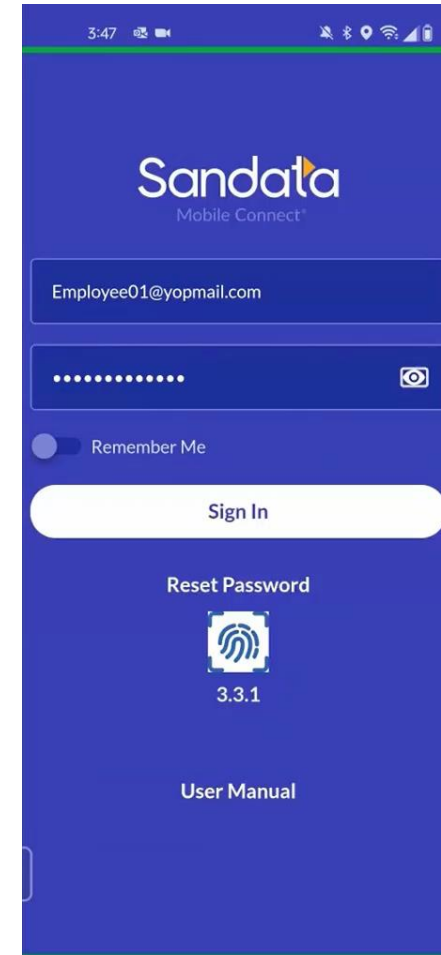




Ending a Visit



1. Log in to SMC app.
2. Tap on the **Visit In Progress**.
3. Tap **Complete Visit**.
 - **Note:** Please defer to your Provider on where to document visit notes (not in app).
4. Select **Location**; tap **Continue**.
5. Tap **Confirm** to end visit.





Why Would You Need to Abandon a Visit?



Kayla, a DSP, arrives at Mr. Ramirez's home to provide a scheduled morning visit. She opens the SMC app and successfully starts the visit. After completing personal care services, Kayla quickly packs up and heads to her next scheduled recipient, thinking she's on time.

At her next stop, Ms. Chen's house, she attempts to start the visit in the SMC app but receives a message that states that she's unable to start a visit because a previous visit is still opened. She quickly realizes that she forgot to end Mr. Ramirez's visit before leaving.

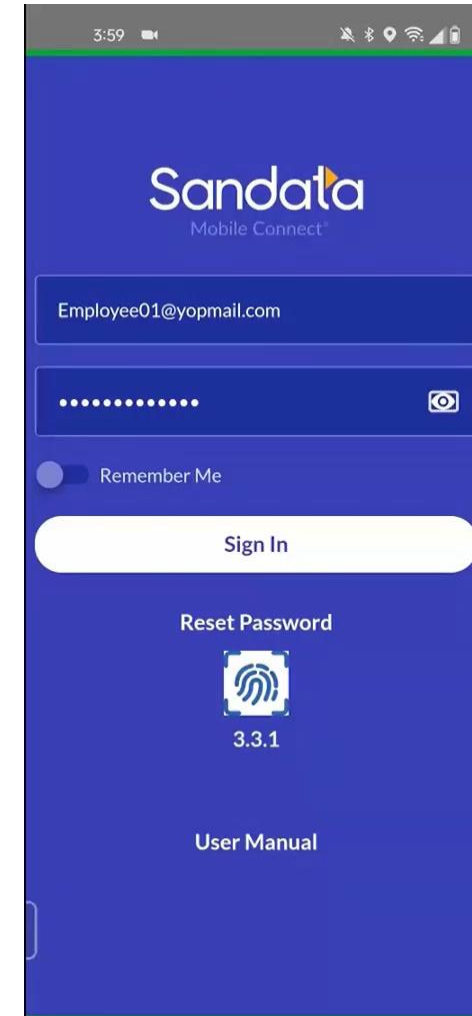
Note: If a DCW/DSP forgets to clock out and 24 hours has elapsed the system will automatically abandon the visit.



Abandoning a Visit



1. Log in to SMC app.
2. Tap on the **Visit In Progress**.
3. Tap the **Trash Can** icon.
 - **Note:** This does not delete the visit record.
4. Tap **Yes** to abandon visit.





Overnight Visits



Sandata will automatically split overnight visits to appropriately identify the number of units per calendar day as required by DODD OAC billing.

Example:

Recipient receives 13 units daily.

Shift: 8:45 pm – 12:30 am

- 13 units day 1 (8:45pm-11:59pm)
- 2 units day 2 (12am-12:30 am)

GENERAL	PAYER	PROGRAM	SERVICE
RECIPIENT	DODD	DD	Residential Respite (RR)
DCW/EMPLOYEE	VISIT 1 - 07/27/2025		
CALL LOG	FROM TIME	TO TIME	BILL HOURS
SPLIT DETAILS	08:47 PM	12:00 AM	03:13
EXCEPTIONS	VISIT 2 - 07/28/2025		
GPS	FROM TIME	TO TIME	BILL HOURS
	12:00 AM	12:30 AM	00:30
			UNITS
			13
			2

[Unit Conversion Table](#)



Telephonic Visit Verification (TVV) Information



Service List



Sandata

Ohio Service List

Write your Santrax ID above for easy reference. This ID is required to be entered when creating a telephony visit.

English toll-free number. Please refer to your Call Reference Guide for additional languages.

Service ID	Description	Service ID	Description
PASSPORT Waiver		Level One, Individual Options, and Self Waiver	
515	PASSPORT Waiver Nursing RN (T1002)	535	IO Waiver Nursing RN (T1002)
616	PASSPORT Waiver Nursing LPN (T1003)	636	IO Waiver Nursing LPN (T1003)
717	PASSPORT Waiver Home Care Attendant Nursing (S5125)	838	Homemaker or Personal Care (HPC)
727	PASSPORT Waiver Choices HCAS (T2025)	842	Participant-Directed Homemaker or Personal Care (HPCPD)
747	PASSPORT Waiver Consumer Directed Personal Care (T1019)	927	Nursing Delegation RN (G0493)
777	PASSPORT Waiver Home Care Attendant Personal Care (S5125)	928	Nursing Delegation RN Per Visit (G0493_U9)
818	PASSPORT Waiver Personal Care (T1019)	929	Nursing Delegation LPN (G0494)
931	PASSPORT Waiver Enhanced Community Living (ECL)	930	Residential Respite (RR)
Ohio Home Care Waiver		State Plan	

Pro-Tip: Keep this printed sheet in an easily accessible location at the recipient’s home.

Ensure that the Santrax ID and toll-free number is printed at the top for easy reference.

Write down the Recipient ID in the folder.

Highlight applicable service codes for the recipient.

Scan the QR code for this OH service list .





Prepare for the Call



Ensure this information is available before calling:

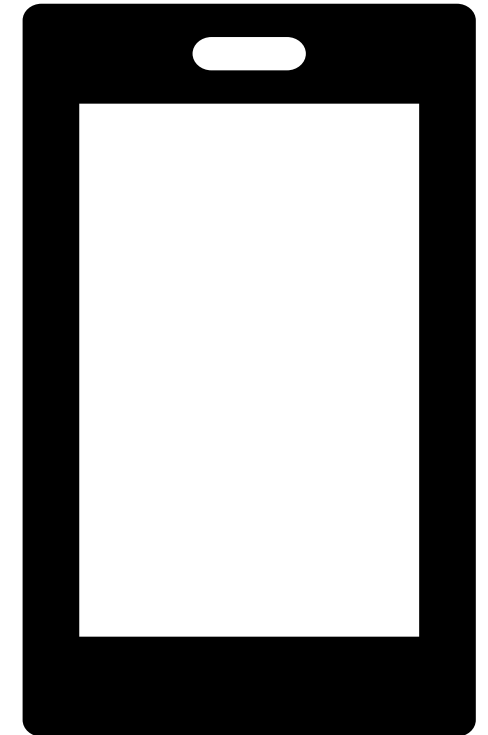
- Santrax ID
- Client ID
- Toll-free number for your agency



Calling In to Start a Visit



1. Dial the assigned toll-free number from client's landline.
2. Select your language.
3. Enter your Santrax ID.
4. Indicate if this is a group visit (Press 1 for Yes; 2 for No).
5. Select Location (Press 1 for Home, 2 for Community).
6. Press 1 to Call In.
7. Enter Client ID.
8. Hang up.

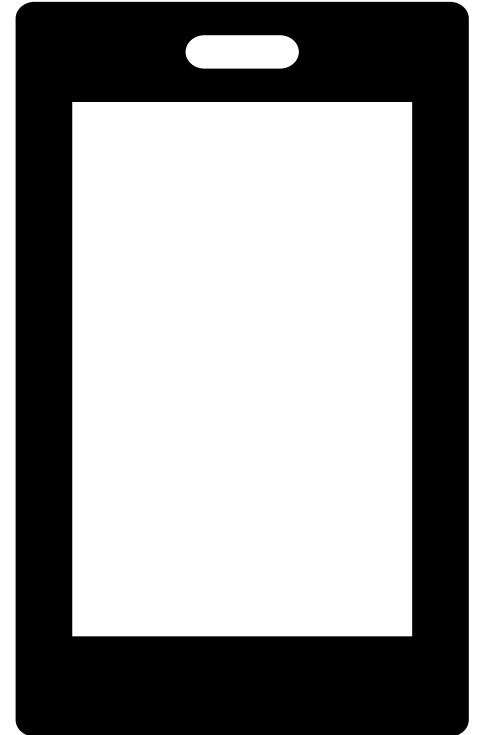




Calling In to End a Visit



1. Dial the assigned toll-free number from client's landline.
2. Select your language.
3. Enter your Santrax ID.
4. Indicate if this is a group visit (Press 1 for Yes; 2 for No).
5. Select Location (Press 1 for Home, 2 for Community).
6. Press 2 to Call Out.
7. Enter Client ID.
8. Enter and Accept Service ID.
9. Hang up.





Preparing your DCW/DSP

> Preparing DSP

You should determine...

- How do your DCW/DSP use technology today?
- What appeals to your DCW/DSP ?
- Where they are in the DCW/DSP lifecycle?

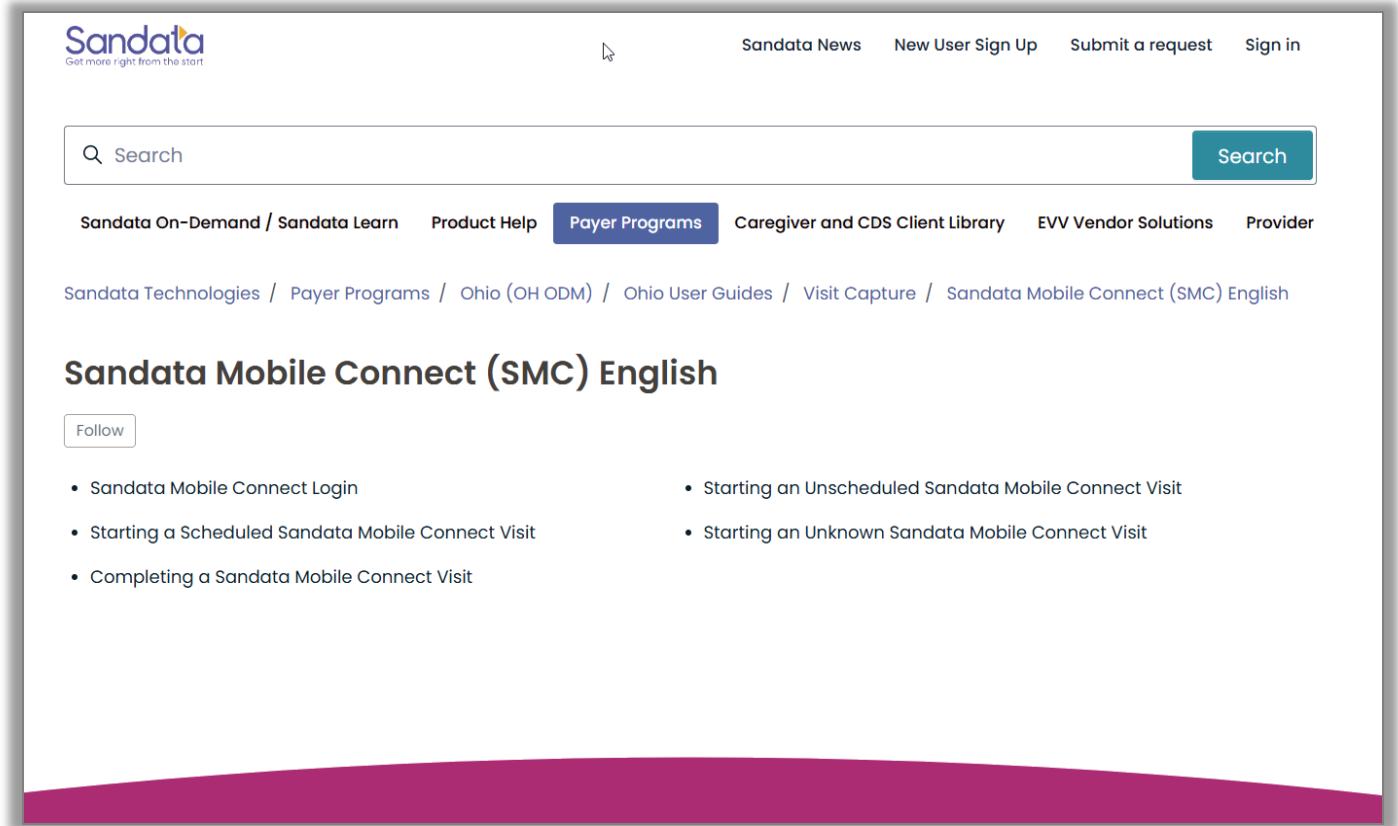
Training DCW/Employees

1. Require your DCW/DSP to download the SMC mobile app during training.
2. Take advantage of EVV training tools and provide documentation.
3. Document the recipient ID and leave it in a folder near the phone in the recipient's home.
4. Set expectations and check in.

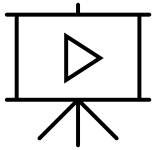




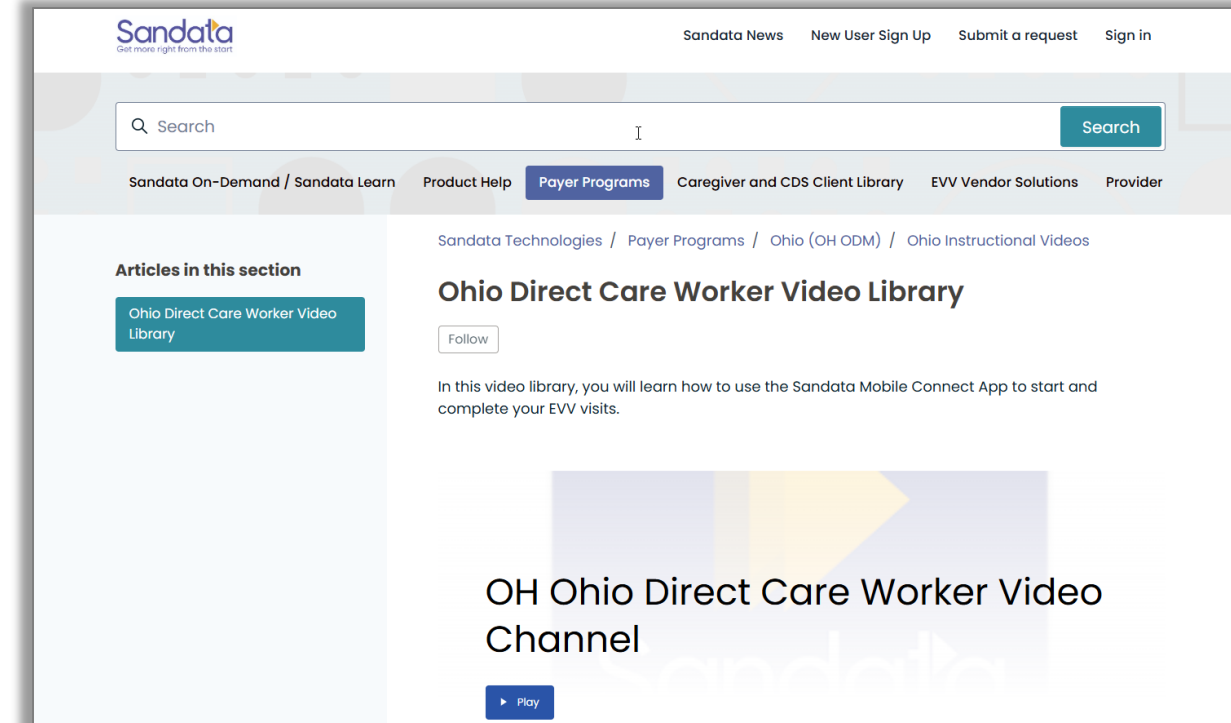
- [Sandata Mobile Connect Documentation](#)
- Documentation on:
 - Downloading and Logging in to mobile app.
 - Starting a visit using the mobile app.
 - [Ohio Service List](#)



DCW/DSP Provider Video Library



- [Ohio Direct Care Worker Video Library](#)
- Videos on:
 - Starting and completing a visit
 - Resetting and changing a password
 - TVV call in and out





Key Takeaways

Key Takeaways – Data Entry



- Ensure the recipient(s) profile status is set to Active prior to capturing EVV visits.
- Edit and/or add services, authorizations to reduce visit exceptions and EVV claim errors.
- Individual providers who need to update DCW/DSP profiles need to update in PNM system first.
- Ensure that your DCW/DSP are enabled to use SMC.
- Provide resources to your DCW/DSP for training to reduce visit exceptions.
- Alt EVV Providers – work with your Alt EVV vendor to create Recipient and DSP/Independent Provider records to capture visits.



Resources



Provider Resources



Ohio User Guides:

- [Ohio User Guides](#)
- [Recipient User Guide](#)
- [DCW/Employee User Guide](#)
- [Ohio Claims Validation: Handling Claims Denials- Sandata Technologies](#)

Claims Matching:

- [Get Ready for Claims Matching Recording](#)

Need Assistance?

- Contact the EVV Provider Hotline at 855-805-3505 [Submit a Zendesk Ticket](#)
 - **Ensure that you have your STX (account #) when calling hotline or submitting ticket!**
- Attend Daily Office Hours – [Register for ODM EVV Office Hours!](#)

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
- Include the following in the email:
 - ✓ Provider Medicaid ID
 - ✓ Alt EVV Vendor
 - ✓ Include Examples (Universal Unique Identifier, copy of payloads) - **ensure this is sent securely via Zendesk portal if there is PHI data.**

Ohio Department of Medicaid

- [Electronic Visit Verification](#)
- [Ohio Department of Medicaid Website](#)
- PASSPORT page – updates coming soon



Questions?



Ohio Sandata On Demand

**THANKS FOR
ATTENDING!**



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