

Our Webinar Will Begin Shortly

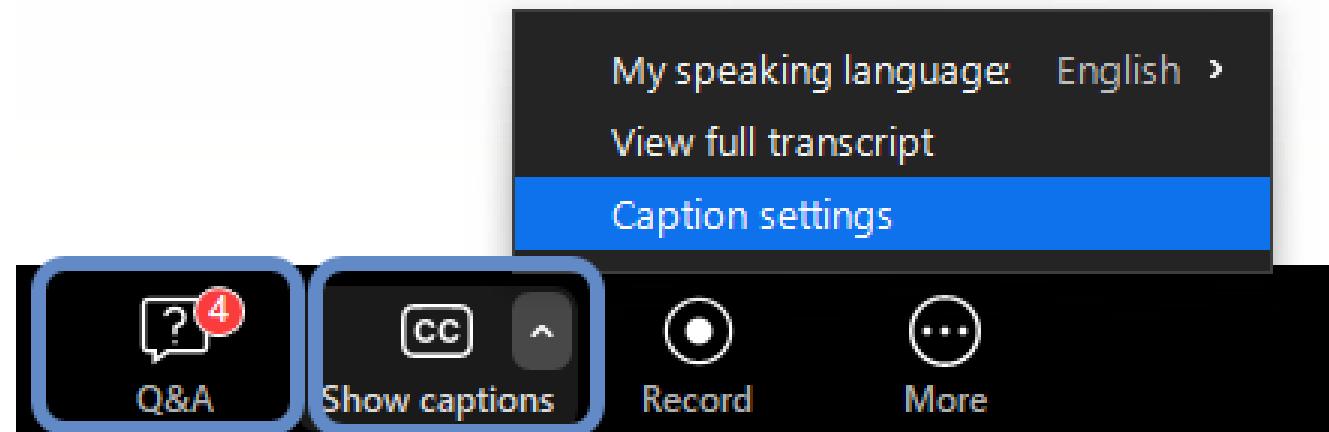
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Accessibility Options

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- 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.
- This webinar is Closed Caption enabled. Please proceed by selecting Show Captions option at the bottom of your screen to enable feature.



Meet the Trainer!



Alejandra Cordova



- **Role: Sponsored Provider Training Specialist**
- **Tenure at HHAeXchange: 3 years**
- **Areas of Expertise: Sponsored Training**
- **Fun Fact: I'm obsessed with Buc-ee's!**

Visit Maintenance

December 2025

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Visit Review and Maintenance



This training will assist providers with an overview of the Visit Maintenance module and how to resolve the top visit exceptions in Sandata EVV.

Who should take this training?

Anyone who will be managing visit data in the Sandata EVV Portal.

Alt EVV providers will perform Visit Maintenance in their Alt EVV system.

This information is sent to Sandata EVV. Please log in to the Sandata Aggregator to confirm that visits are in a verified status prior to submitting claims. For additional support on resolving visit maintenance exceptions, please contact your Alt EVV vendor.

Objectives of Today's Training

You will be able to:

- Locate visit data.
- Identify and resolve visit exceptions.
- Manually create visits.



Sandata Standard System Terminology

Corresponding Terminology

CONTRACT / PAYER

- FFS
- HHS
- MCO
- State
- Plan

Recipient

- CDS Employer
- Consumer
- Patient
- Client
- Participant
- Beneficiary
- Individual

DCW/Employee

- Aide
- Homecare Aid
- Homecare Worker
- Worker
- Direct Support Professionals (DSP)
- Service Provider
- Participant-directed provider
- Attendant
- Caregiver
- Non-Agency (Independent) Provider
- Direct care worker

AGENCY / PROVIDER

- FMSA
- Vendor
- Program Provider
- Non-Agency (Independent) Provider
- Participant-directed Providers
- AGE-certified provider
- Agency provider

COORDINATOR

- Care Coordinator
- Case Coordinator
- Service Coordinator
- Care Types
- Case manager

UNITY NUMBER

- EMPI
- Master Patient Number
- Shared Patient Number

SECONDARY IDENTIFIER

- MPI
- Promise Code

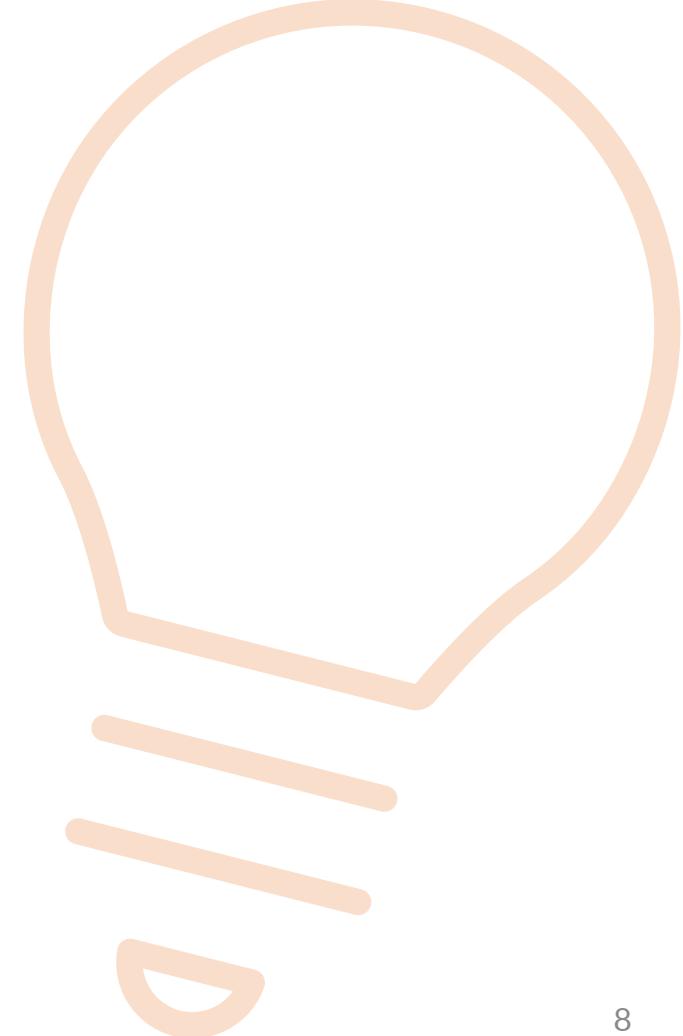
Knowledge Checks

You'll see these throughout the presentation!



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

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





Claims Validation Implementation Phases



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	IO, 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.*

➤ List of Services Ohio Home Care Waiver Services

- Personal Care Aide - T1019
- Waiver Nursing – Registered Nurse – T1002
- Waiver Nursing – Licensed Practical Nurse – T1003
- Home Care Attendant – Personal Care or Nursing - S5125
- This includes self-directed services.



Ohio Department of Medicaid

Ohio Home Care Waiver Services



Subject to EVV

Home Care Attendant

Personal Care Aide

Waiver Nursing

All self-directed services (through the FMS)



NOT Subject to EW

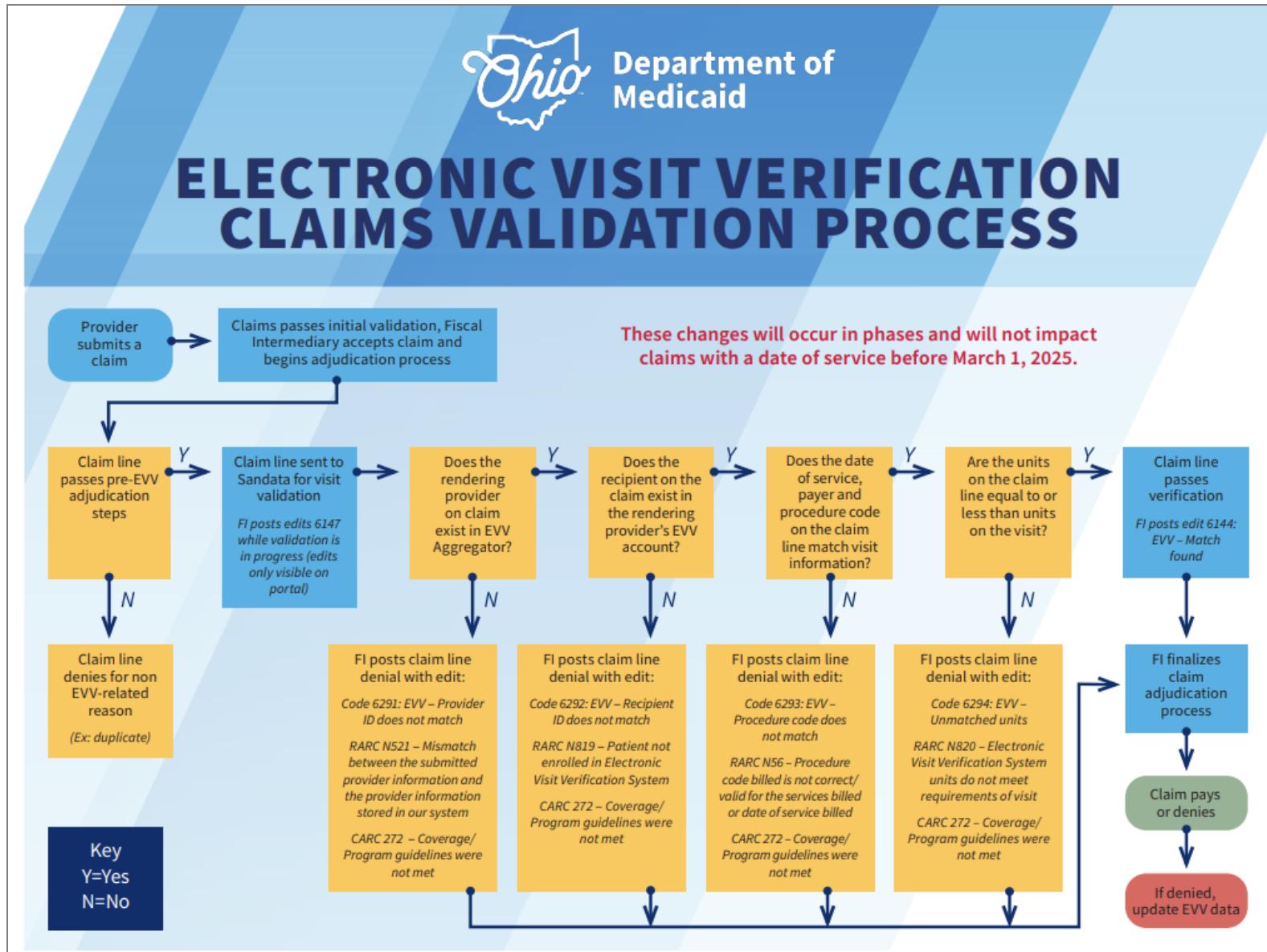
Facility-based services

Structured Family Caregiving

Services requiring EW delivered by
exempted live-in caregivers

For a comprehensive list of services requiring EW under ODM waivers, please refer to [OAC 5160-32-01](#).

Electronic Visit Verification Claims Validation Process





List of Services Billed to (AGE) PASSPORT Waiver Services



- Personal Care Aide: T1019
- Participant- Directed Personal Care Aide : T1019
- Waiver Nursing- Registered Nurse: T1002
- Waiver Nursing- Licensed Practical Nurse: T1003
- Home Care Attendant: S5125
- Choices Home Care Attendant: T2025
- Enhances Community Living: ECL



Ohio Department of Aging (AGE) PASSPORT Waiver Services



Subject to EVV

Choices Home Care Attendant
Enhanced Community Living
Home Care Attendant
Personal Care
Participant-Directed Personal Care
Waiver Nursing



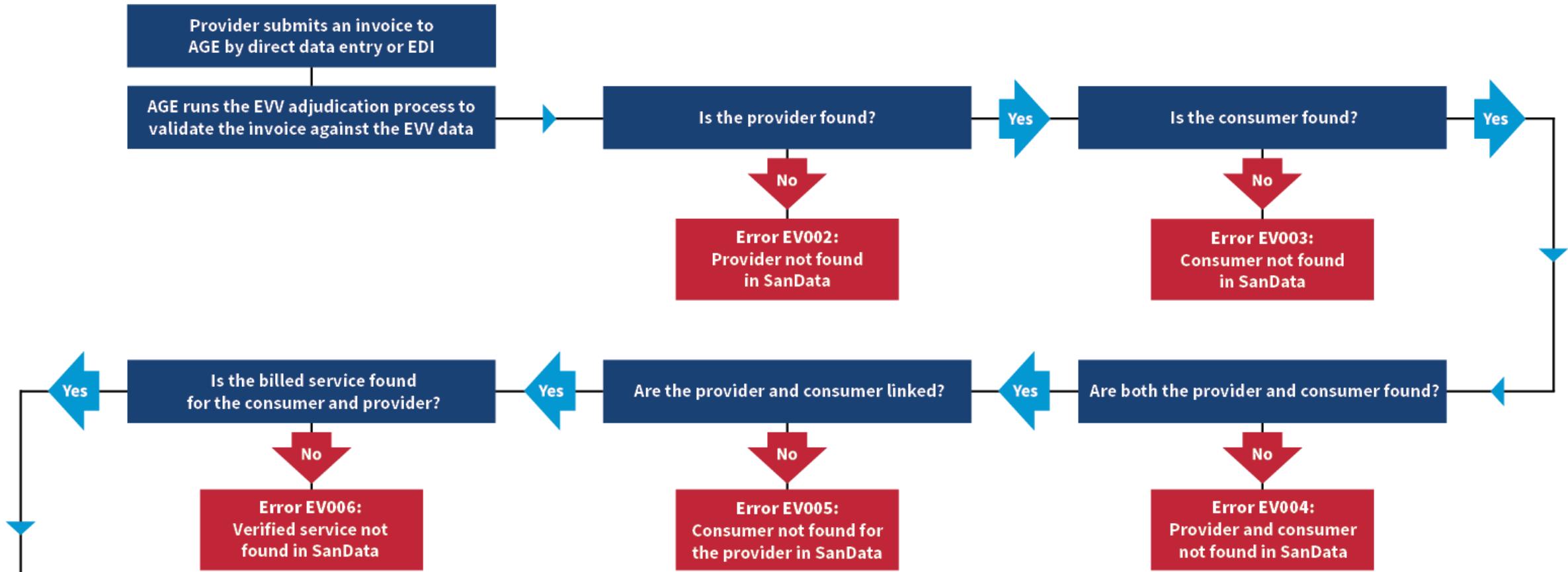
NOT Subject to EVV

Services that do not include personal care, like
Homemaker
Facility-based services
Services, subject to EVV, provided by live-in
Caregivers (with approved exemption)

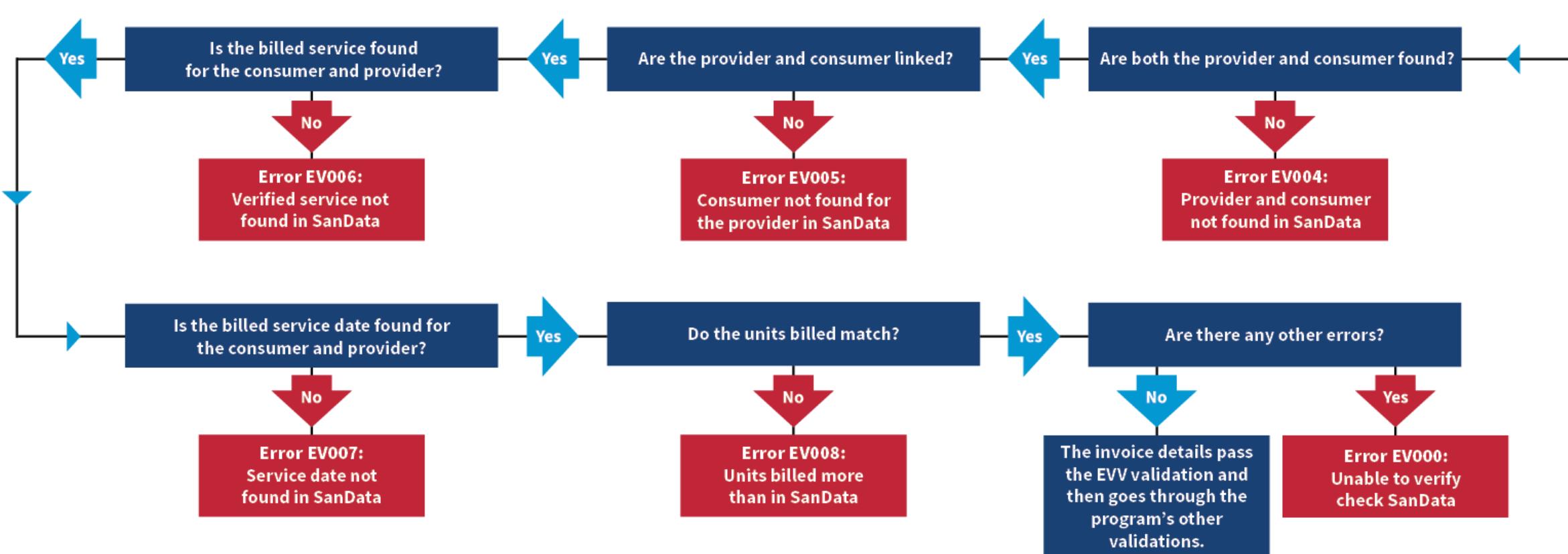
For a comprehensive list of all services requiring EVV, please refer to [OAC 5160-32-01](https://www.ohio.gov/oac/5160-32-01).



Ohio Department of Aging Electronic Visit Verification Claims Validation Process (1 of 2)

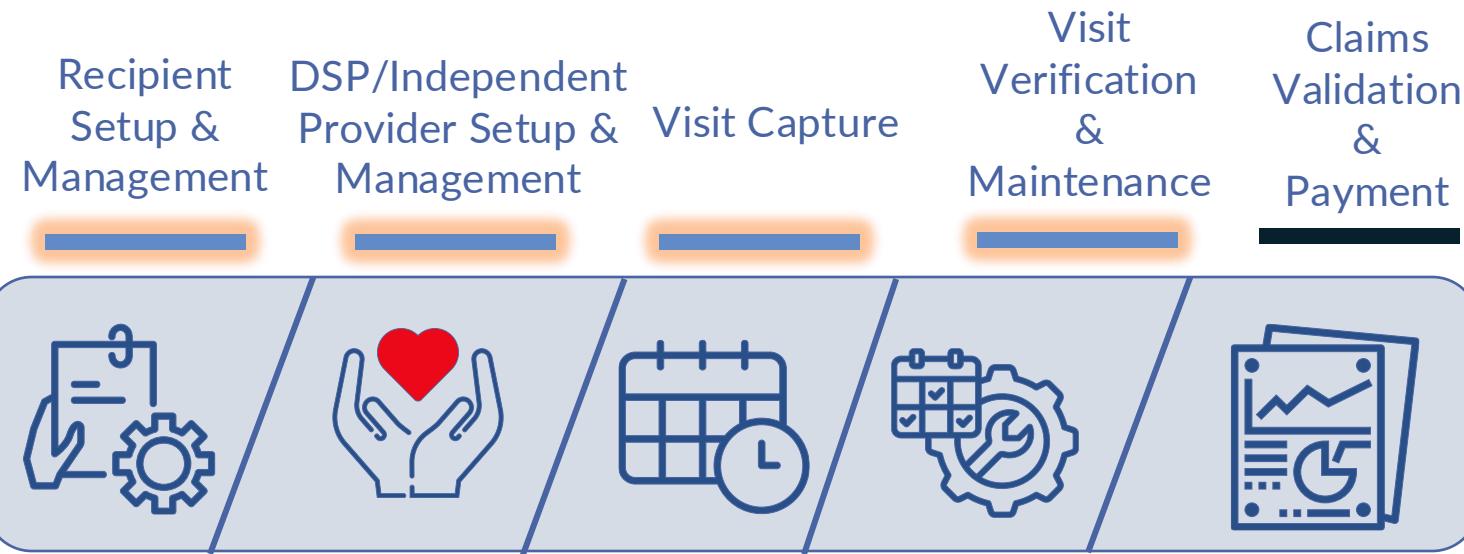


Ohio Department of Aging Electronic Visit Verification Claims Validation Process (2 of 2)





EVV Tracker





Agenda

- Visit Maintenance Overview
- How to Create a Manual Visit
- How to Resolve Missing Medicaid ID
- Key Takeaways
- How to Resolve Unknown Client Exception
- Support Resources
- How to Resolve Missing Call In/Out Exception
- Questions
- How to Resolve Unauthorized Service Exception

Visit Maintenance Overview

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List of Services Ohio Home Care Waiver Services



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NOT Subject to EW

Facility-based services

Structured Family Caregiving

Services requiring EW delivered by
exempted live-in caregivers

For a comprehensive list of services requiring EW under ODM waivers, please refer to [OAC 5160-32-01](#).



What Happens During the Claims Validation Process?



Step 1: Direct support professional or Independent Provider captures the visit, or the provider manually creates the visit in the Alt EVV system.



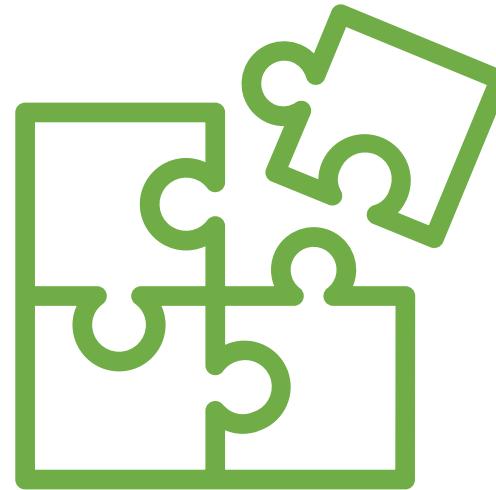
What Happens During the Claims Validation Process?



Step 2: Provider performs visit maintenance and resolves any visit exceptions in their Sandata EVV system. Provider confirms visits are in a verified status prior to submitting claims.



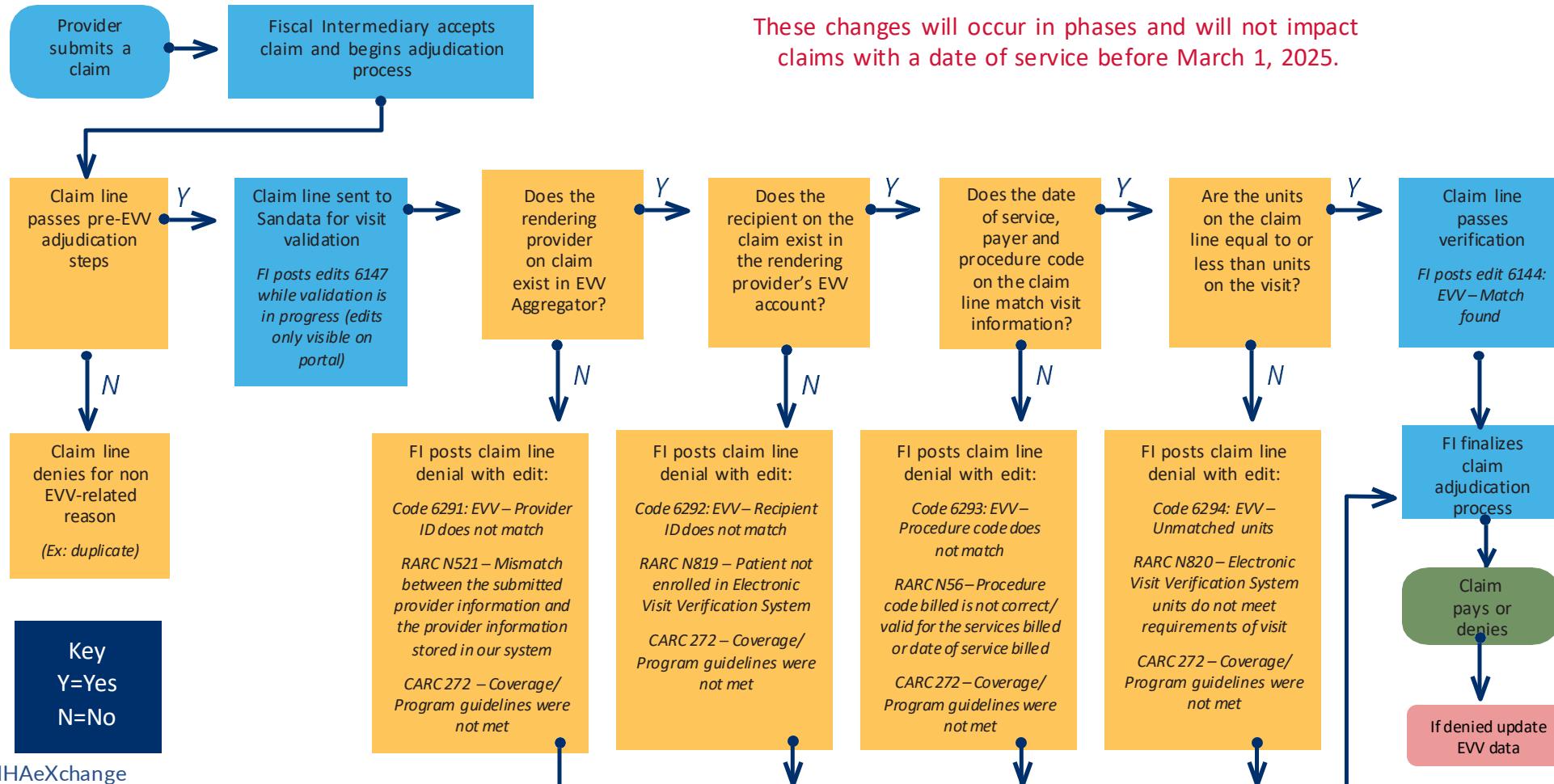
Step 3: Payer can now match claims to EVV visits.



Electronic Visit Verification Claims Validation Process



ELECTRONIC VISIT VERIFICATION CLAIMS VALIDATION PROCESS





List of Services Billed to (AGE) PASSPORT Waiver Services



- Personal Care Aide: T1019
- Participant- Directed Personal Care Aide : T1019
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Ohio Department of Aging (AGE) PASSPORT Waiver Services



Subject to EVV

Choices Home Care Attendant
Enhanced Community Living
Home Care Attendant
Personal Care
Participant-Directed Personal Care
Waiver Nursing



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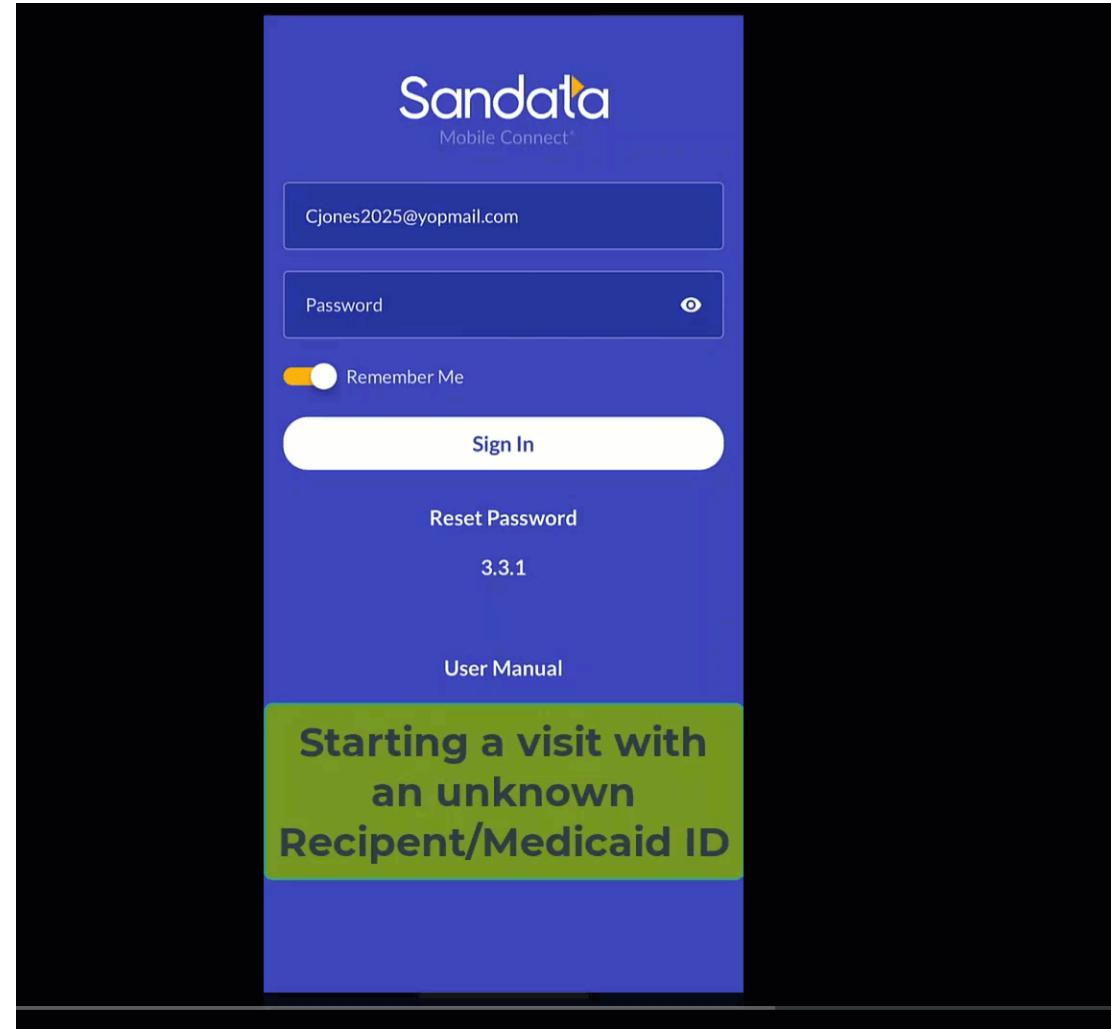
For a comprehensive list of all services requiring EVV, please refer to [OAC 5160-32-01](https://www.ohio.gov/oac/5160-32-01).



What Happens during the Claims Validation Process?



Step 1: DSP/Independent Provider captures the visit using Sandata Mobile Connect (SMC) app, Telephonic Visit Verification (TVV), or provider manually creates





What Happens during the Claims Validation Process?

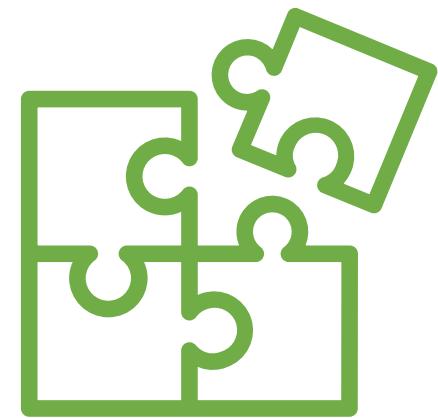
Step 2: Provider performs visit maintenance and resolves any EVV exceptions to turn visit into a verified status.



Step 3: Provider submits claims.

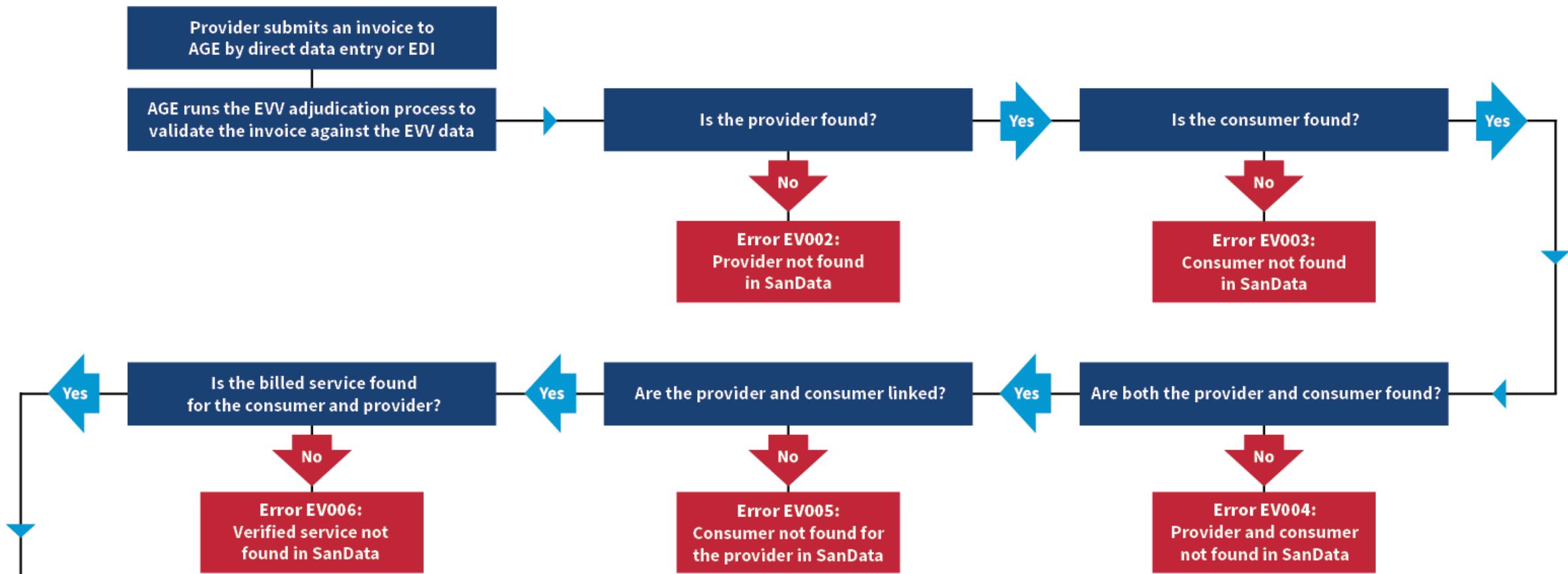


Step 4: Payer can now match claims to EVV visits.

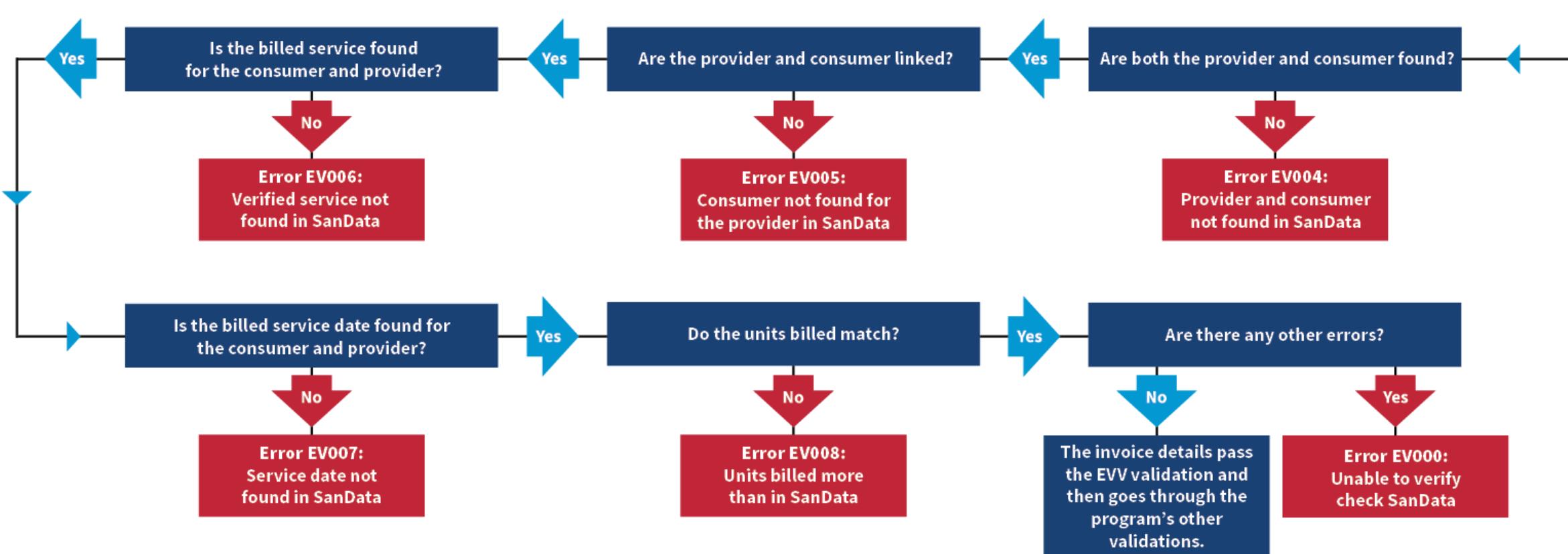




Ohio Department of Aging Electronic Visit Verification Claims Validation Process (1 of 2)



Ohio Department of Aging Electronic Visit Verification Claims Validation Process (2 of 2)





What is an Exception?

An exception occurs when one of the required EVV elements is missing or incorrect, such as the Recipient ID, DSP/Independent Provider ID, Service, Location, Date or Start and End time of service.



Exception Legend in Visit Maintenance

CREATE VISIT **CREATE CALL**

Show Legend

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE
Rambo, John	Andrea, Test	SPHH Nsg - LPN (G0300)	02/19/2025
Rambo, John	Andrea, Test	SPHH Nsg - RN (G0299)	02/18/2025
Training, Recipient	PAX, ORION	Passport - PCA (T1019)	02/14/2025
(213)205-0998	Employee, Translator	●	02/13/2025
Carrero, Celine	Employee, Translator	●	02/10/2025
Training, Recipient	PAX, ORION	Passport - PCA (T1019)	02/09/2025
		Passport -	

Legend

Highlight colors

- Exception (Red)
- Multiple Recipient with the same phone (Orange)
- Visit Created Manually (Yellow)
- Task(s) Exist for Visit (Dark Blue)
- UVV Device Indicator (Blue)

Icons/Acronyms

- GPS R - GPS Distance Within Range
- GPS E - GPS Distance Exception
- GPS U - GPS Distance Unknown
- MC - Manual Call
- VRC - Recipient Voice Recording
- MRC - Missing Reason Code

CLOSE

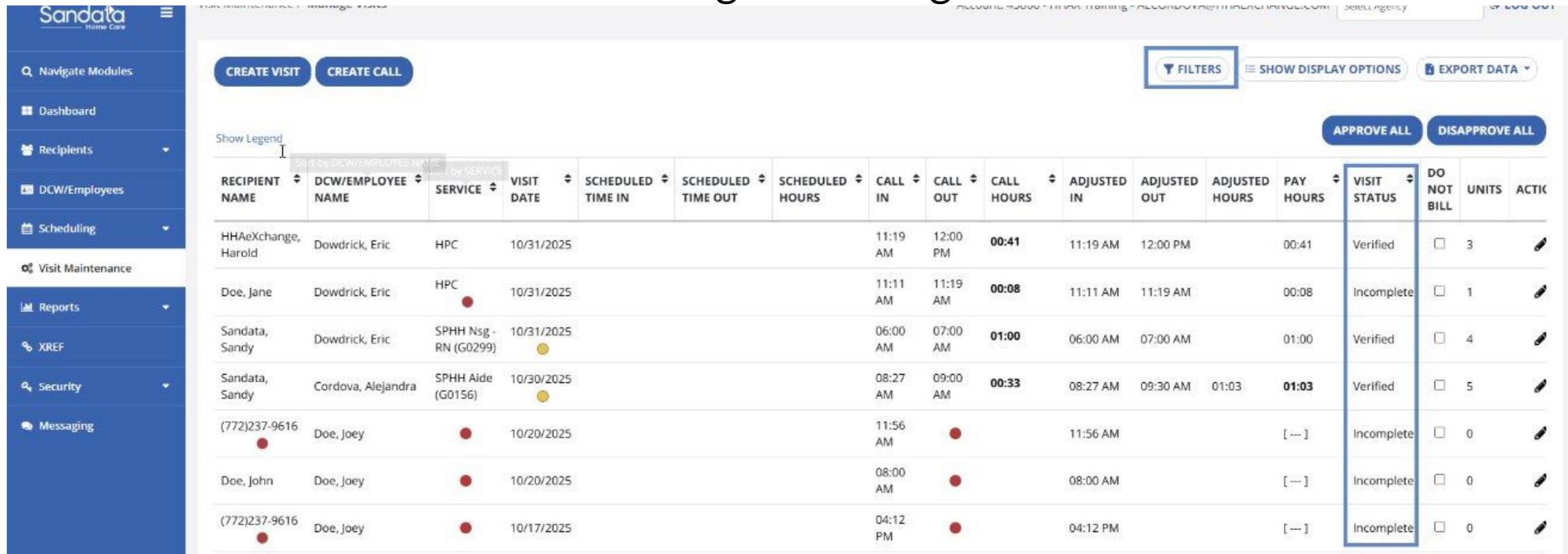


Steps to Locate Visit Maintenance



1. Navigate to the Visit Maintenance module
2. You will see exceptions from the current day.

Note: Use the filter button to change date range.



Visit Maintenance																		
Recipient		DCW/Employee Name	Service	Visit Date	Scheduled Time In	Scheduled Time Out	Scheduled Hours	Call In	Call Out	Call Hours	Adjusted In	Adjusted Out	Adjusted Hours	Pay Hours	Visit Status	Do Not Bill	Units	Active
HHAeXchange, Harold	Dowdrick, Eric	HPC		10/31/2025			11:19 AM	12:00 PM	00:41	11:19 AM	12:00 PM		00:41	Verified	<input type="checkbox"/>	3		
Doe, Jane	Dowdrick, Eric	HPC		10/31/2025			11:11 AM	11:19 AM	00:08	11:11 AM	11:19 AM		00:08	Incomplete	<input type="checkbox"/>	1		
Sandata, Sandy	Dowdrick, Eric	SPHH Nsg RN (G0299)		10/31/2025			06:00 AM	07:00 AM	01:00	06:00 AM	07:00 AM		01:00	Verified	<input type="checkbox"/>	4		
Sandata, Sandy	Cordova, Alejandra	SPHH Aide (G0156)		10/30/2025			08:27 AM	09:00 AM	00:33	08:27 AM	09:30 AM	01:03	01:03	Verified	<input type="checkbox"/>	5		
(772)237-9616	Doe, Joey			10/20/2025			11:56 AM			11:56 AM			[...]	Incomplete	<input type="checkbox"/>	0		
Doe, John	Doe, Joey			10/20/2025			08:00 AM			08:00 AM			[...]	Incomplete	<input type="checkbox"/>	0		
(772)237-9616	Doe, Joey			10/17/2025			04:12 PM			04:12 PM			[...]	Incomplete	<input type="checkbox"/>	0		



Select Reason Code for an Exception

Select the Reason Code for the exception and add an optional Reason Note to explain the reason for the exception.

* indicates required field

Reason Code *

Select Reason Code

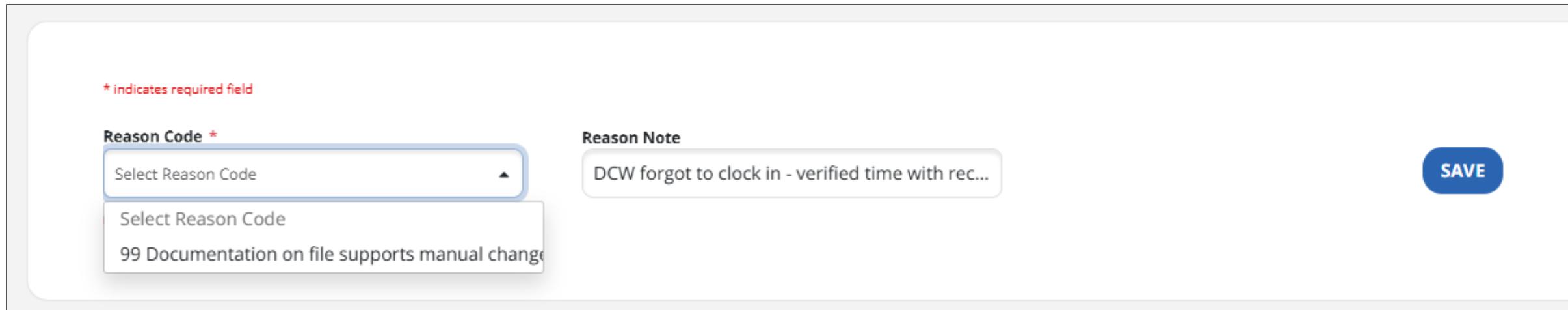
Select Reason Code

99 Documentation on file supports manual change

Reason Note

DCW forgot to clock in - verified time with rec...

SAVE



Note: This is mock data that is used only for training purposes.



Visit Maintenance Overview Demo

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



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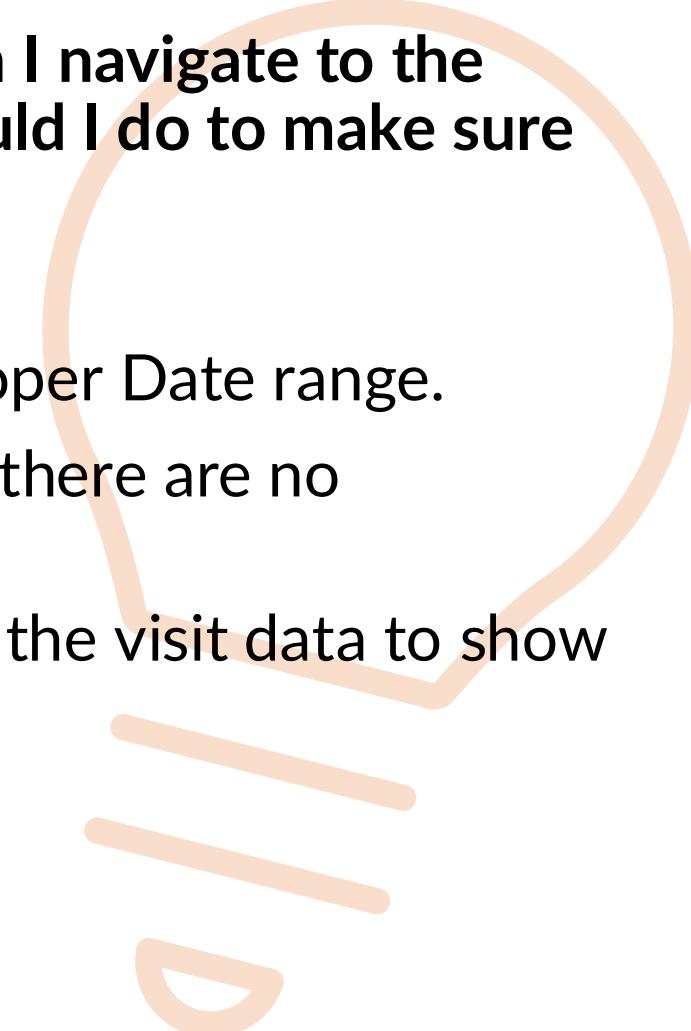


Knowledge Check – Visit Maintenance Overview



I'm trying to locate my visits from last week, but when I navigate to the Visit Maintenance screen, no data appears. What should I do to make sure this information is visible?

- A. Ensure Filters have been updated to reflect the proper Date range.
- B. Only exceptions appear on this screen; this means there are no exceptions.
- C. Recipient status needs to be in an active status for the visit data to show up.
- D. Select **Export Data** for the information to appear.

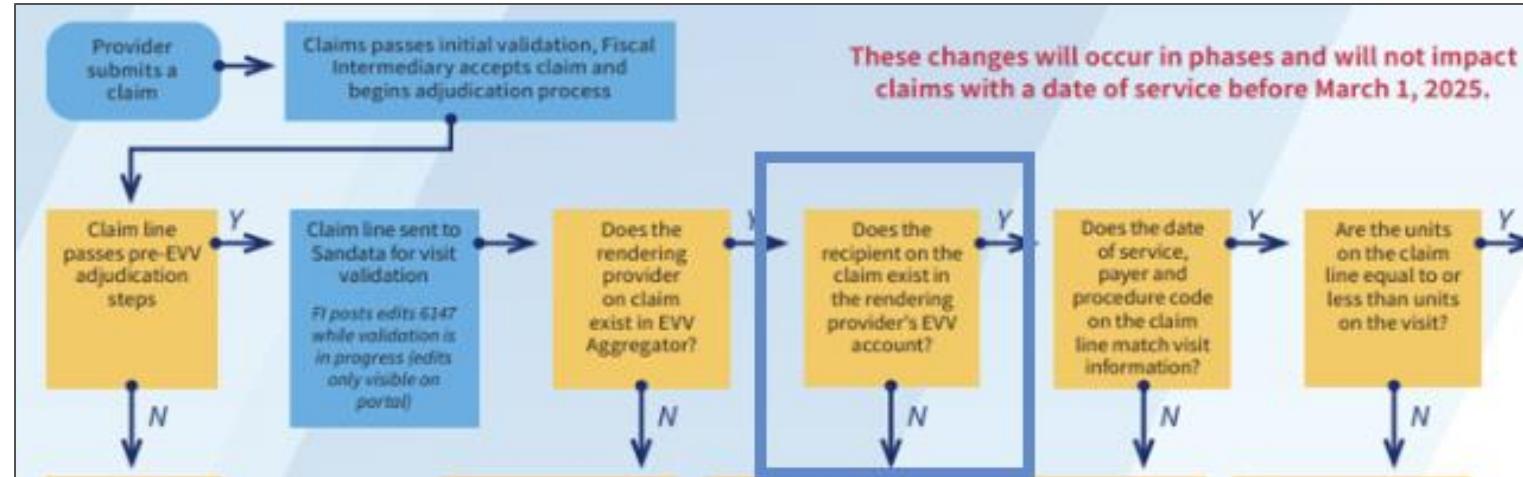


How to Resolve for Missing Medicaid ID

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Why is the Medicaid ID important?



The **Recipient ID** is automatically generated when you created a Recipient in Sandata EVV. The **Medicaid ID** is a required field on the Recipient record and is needed upon Recipient creation.

- In some instances (such as with a newborn) there may not be a Medicaid ID available when creating the Recipient.
- Visits missing the Medicaid ID prevents the visit from being verified.
- **Note:** There is no visible exception – use Filters to locate missing Medicaid ID when performing visit maintenance.



How can I locate visits where the Medicaid ID is missing?

1. Navigate to Visit Maintenance > select the Filter icon.
2. Select Exception Types in Visits by Field.
3. Select Missing Medicaid ID in Exception Types field.
4. Select Apply Filters to review results.

The screenshot shows the Sandata Visit Maintenance / Manage Visits page. The main table displays visit details for four recipients. The filter dialog on the right is open, with the 'Exception Types' section selected. Under 'Exception Types', the 'Missing Medicaid ID' checkbox is checked. Other filter options like 'Select All', 'Search', 'Late In-Call', 'Missing Location', 'Missing Service', and 'Missing Medicaid ID' are also listed.

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT
HHAeXchange, Harold	Dowdrick, Eric	HPC	10/31/2025				11:19 AM	12:00 PM	00:41	11:19 AM	12:00 PM
Doe, Jane	Dowdrick, Eric	HPC	10/31/2025				11:11 AM	11:19 AM	00:08	11:11 AM	11:19 AM
Sadata, Sandy	Dowdrick, Eric	SPHH Nsg-RN (G0299)	10/31/2025				06:00 AM	07:00 AM	01:00	06:00 AM	07:00 AM
Sadata, Sandy	Cordova, Alejandra	SPHH Aide (G0156)	10/30/2025				08:27 AM	09:00 AM	00:33	08:27 AM	09:30 AM

Total: 02:22

Filters

- From Date: 10/28/2025
- To Date: 11/11/2025
- Recipient: Enter Recipient
- DCW/Employee: Enter DCW/Employee
- Payer: Select Payer
- Program: Select Program
- Service: Select Service
- Category: Select Category
- Visit Status: Select Visit Status
- Recipient Medicaid ID: Enter Recipient Medicaid ID
- Exception Types: Missing Medicaid ID
- Call Type: Select All
- DCW/Employee Other ID: Search
- Supervisors: Late In-Call
- Department: Missing Location
- Missing Medicaid ID
- Missing Service



Recipient Medicaid ID

1. Navigate to Recipients > Recipient Management.
2. Filter to the name of the Recipient that is incorrect; select their Status to open the Recipient record.
3. Navigate to the Program tab> navigate to Status.
4. Select Discharged from dropdown options.
5. Create a New Recipient record with the correct or updated Medicaid ID.

Payer Details

Payer Name: ODM

Rank: 1

Recipient Payer ID: -

Start Date: -

Medicaid ID: [redacted]

Group Number: -

End Date: -

Voided Auth. Expired Auth. [ADD AUTHORIZATION](#)

Authorization Details

Payer: ODM

Service: T1019

Event Code: NONE- None

Start Date: 11/08/2024

Comment: -

Total Maximum: 0

Total Used: 0

Authorization No: [redacted]

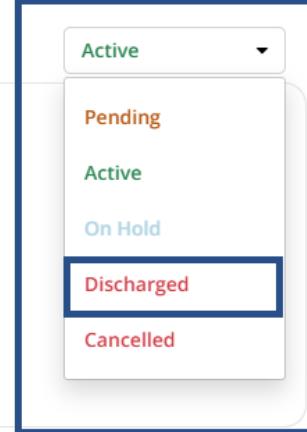
Modifiers: -

Format: Units

End Date: 10/03/2050

Total Missed: 0

Total Remaining: 0

The status dropdown menu is open, showing the following options: Active (green), Pending (orange), Active (green), On Hold (light blue), Discharged (red, highlighted with a blue border), and Cancelled (red).

Creating a New Recipient

How to Resolve for Unknown Recipient Exception

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Unknown Recipient Exception



Cause: Visit occurred where the Recipient ID was not entered in the call.

Example: DCW/DSP did not know Recipient's ID number and recorded the Recipient name in the Memo section.

Resolution: Search for a Recipient and add them to the visit.

Creating A New Recipient

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTIONS
(213)205-0998	Employee, Translator		02/13/2025			07:37 PM			07:37 PM				Incomplete	<input type="checkbox"/>		

Note: This is mock data that is used only for training purposes.



Steps to Resolve Unknown Recipient Exception



1. Navigate to **Visit Maintenance** and locate the visit.
2. Select the red dot under the **Service** column.
3. Navigate to the **Memo** tab and verify if recipient name is listed.
Note: Contact DCW/DSP to confirm recipient name if this record is not available.
4. In **Find Recipient** section, use filters to enter Recipient name and select **Apply Filters**.
5. Locate and select the Recipient.
6. Select **Reason Code**, enter reason note (optional), and select **Save**.



How to Resolve Unknown Recipient Exception Demo

Account 45000 - Trial Version - Record Owner: HHAeXchange Select Agency 

CREATE VISIT **CREATE CALL** **FILTERS** **SHOW DISPLAY OPTIONS** **EXPORT DATA**

APPROVE ALL **DISAPPROVE ALL**

Show Legend

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTION
Doe, Jane	Dowdrick, Eric	HPC	10/31/2025			11:11 AM	11:19 AM	00:08	11:11 AM	11:19 AM		00:08	Incomplete	<input type="checkbox"/>	1		
(772)237-9616	Doe, Joey		10/20/2025			11:56 AM			11:56 AM			[---]	Incomplete	<input type="checkbox"/>	0		
Doe, John	Doe, Joey		10/20/2025			08:00 AM			08:00 AM			[---]	Incomplete	<input type="checkbox"/>	0		
(772)237-9616	Doe, Joey		10/17/2025			04:12 PM			04:12 PM			[---]	Incomplete	<input type="checkbox"/>	0		
Doe, John	Doe, Joey		10/17/2025			03:36 PM			03:36 PM			[---]	Incomplete	<input type="checkbox"/>	0		
Doe, Jane	Doe, Jay		10/17/2025			08:00 AM			08:00 AM			[---]	Incomplete	<input type="checkbox"/>	0		
Doe, John	Test, TestOne	MyCare - Waiver Choices HCAS (T2025)	10/17/2025	06:00 AM	07:00 AM	01:00							[---]	Incomplete	<input type="checkbox"/>	0	
Doe, John	Test, TestOne	MyCare - Waiver Choices HCAS (T2025)	10/10/2025	06:00 AM	07:00 AM	01:00							[---]	Incomplete	<input type="checkbox"/>	0	
		MyCare -															



How to Resolve Missing Call In/Outs

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Visit Missing In/Out Calls



Cause: A visit that is recorded without an in and/or out call.

Example: A DCW/DSP clocks in for visit but does not clock out (or vice versa).

Resolution: Confirm time with Recipient and/or DCW/DSP and manually enter time of completion (either call in or out).

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS
Doe, Jane	Dowdrick, Eric	HPC	10/31/2025			11:11 AM		11:19 AM	00:08	11:11 AM	11:19 AM		00:08	Incomplete
Doe, Jane	Doe, Joey		10/20/2025			11:56 AM				11:56 AM		[---]		Incomplete



Steps to Resolve Missing In/Outs



1. Navigate to Visit Maintenance and locate the visit.
2. Select the red dot under the Call In or Call Out column.
3. In the **Add Manual Call** section, enter the **Call Date**, **Call Time**, **Service**, and **Location** of the visit.
4. Select **Reason Code**, enter reason note (optional), and select **Save**.



How to Resolve Missing Call In/Out Demo

Navigate Modules

Dashboard

Recipients

DCW/Employees

Scheduling

Visit Maintenance

Reports

XREF

Security

Messaging

CREATE VISIT CREATE CALL

FILTERS

SHOW DISPLAY OPTIONS

EXPORT DATA

APPROVE ALL DISAPPROVE ALL

Show Legend

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL	UNITS	ACTION
HHAeXchange, Harold	Dowdrick, Eric	HPC	10/31/2025			11:19 AM	12:00 PM	00:41	11:19 AM	12:00 PM		00:41	Verified	<input type="checkbox"/>	3		
Doe, Jane	Dowdrick, Eric	HPC	10/31/2025			11:11 AM	11:19 AM	00:08	11:11 AM	11:19 AM		00:08	Incomplete	<input type="checkbox"/>	1		
Sandata, Sandy	Dowdrick, Eric	SPHH Nsg - RN (G0299)	10/31/2025			06:00 AM	07:00 AM	01:00	06:00 AM	07:00 AM		01:00	Verified	<input type="checkbox"/>	4		
Sandata, Sandy	Cordova, Alejandra	SPHH Aide (G0156)	10/30/2025			08:27 AM	09:00 AM	00:33	08:27 AM	09:30 AM	01:03	01:03	Verified	<input type="checkbox"/>	5		
Doe, Jane	Doe, Joey		10/20/2025			11:56 AM			11:56 AM			[--]	Incomplete	<input type="checkbox"/>	0		
Doe, John	Doe, Joey	MyCare - PCA (T1019)	10/20/2025			08:00 AM			08:00 AM			[--]	Incomplete	<input type="checkbox"/>	0		
(772)237-9616	Doe, Joey		10/17/2025			04:12 PM			04:12 PM			[--]	Incomplete	<input type="checkbox"/>	0		
Doe, John	Doe, Joey		10/17/2025			03:36 PM			03:36 PM			[--]	Incomplete	<input type="checkbox"/>	0		
Doe, John	Doe, Joey	MyCare - Waiver Choices HCAS (T2025)	10/17/2025			02:00 PM	02:21 PM	00:21	02:00 PM	02:21 PM		00:21	Verified	<input type="checkbox"/>	2		
Doe, John	Doe, Joey		10/17/2025			08:00			08:00 AM								



How to Resolve Unauthorized Service Exception

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Unauthorized Service Exception



Cause: This error could be caused by a variety of issues including:

- Missing, incorrect or expired EVV authorization
- Missing or incorrect service code
- Missing or incorrect Payer and/or Program

Example: DCW/DSP selects the incorrect service during an unknown visit.

Resolution: Verify the authorization on the Recipient is entered and correct. If authorization is correct, update the service on the call to match.

RECIPIENT NAME	DCW/EMPLOYEE NAME	PAYER	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	ADJUSTED HOURS	PAY HOURS	VISIT STATUS	DO NOT BILL	UNITS
Bull, Elaine	Trainer, OHIOProvider		MyCare - PCA (T1019)	12/16/2024	●		03:27 PM			03:27 PM		[---]		Incomplete	<input type="checkbox"/>		



Steps to Resolve Unauthorized Service Exception



1. Navigate to **Visit Maintenance** and locate visit.
2. Select the red dot under the **Service** column
3. Review the **Recipient name, Payer, Program, and Service** associated to this visit.
4. Navigate to **Recipient > Recipient Management** and locate the Recipient using Quick Search or Filters.
5. Select **Recipient Name** to view their record; select the **Program** tab.
6. Confirm that the **Payer, Program, Service and Authorizations** are entered and correct. If not, make required changes.
7. If the information is correct, return to Visit Maintenance; on the **General** tab of the visit, make necessary corrections to the **Payer, Program, and Service**.
8. Select **Reason Code**, enter reason note (optional), and select **Save**.



How to Resolve Unauthorized Service Exception Demo

Sodata EVV | Manage Visits x +

ew-ui.sodata.com/visit-maintenance

Visit Maintenance / Manage Visits

Account: 43866 - HHAX Training - ALCORDOVA@HHAEXCHANGE.COM

Select Agency

LOG OUT

CREATE VISIT CREATE CALL

FILTERS SHOW DISPLAY OPTIONS EXPORT DATA

APPROVE ALL DISAPPROVE ALL

Show Legend

RECIPIENT NAME	DCW/EMPLOYEE NAME	SERVICE	VISIT DATE	SCHEDULED TIME IN	SCHEDULED TIME OUT	SCHEDULED HOURS	CALL IN	CALL OUT	CALL HOURS	ADJUSTED IN	ADJUSTED OUT	AI H
HHaEExchange, Harold	Dowdrick, Eric	HPC	10/31/2025				11:19 AM	12:00 PM	00:41	11:19 AM	12:00 PM	
Doe, Jane	Dowdrick, Eric	HPC	10/31/2025				11:11 AM	11:19 AM	00:08	11:11 AM	11:19 AM	
Sodata, Sandy	Dowdrick, Eric	RN Consultation (T1001)	10/31/2025				06:00 AM	07:00 AM	01:00	06:00 AM	07:00 AM	
Sodata, Sandy	Cordova, Alejandra	SPHH Aide (G0156)	10/30/2025				08:27 AM	09:00 AM	00:33	08:27 AM	09:00 AM	

Total: 02:22

25 of 4 entries

« < 1 > »

https://evv-ui.sodata.com/visit-maintenance

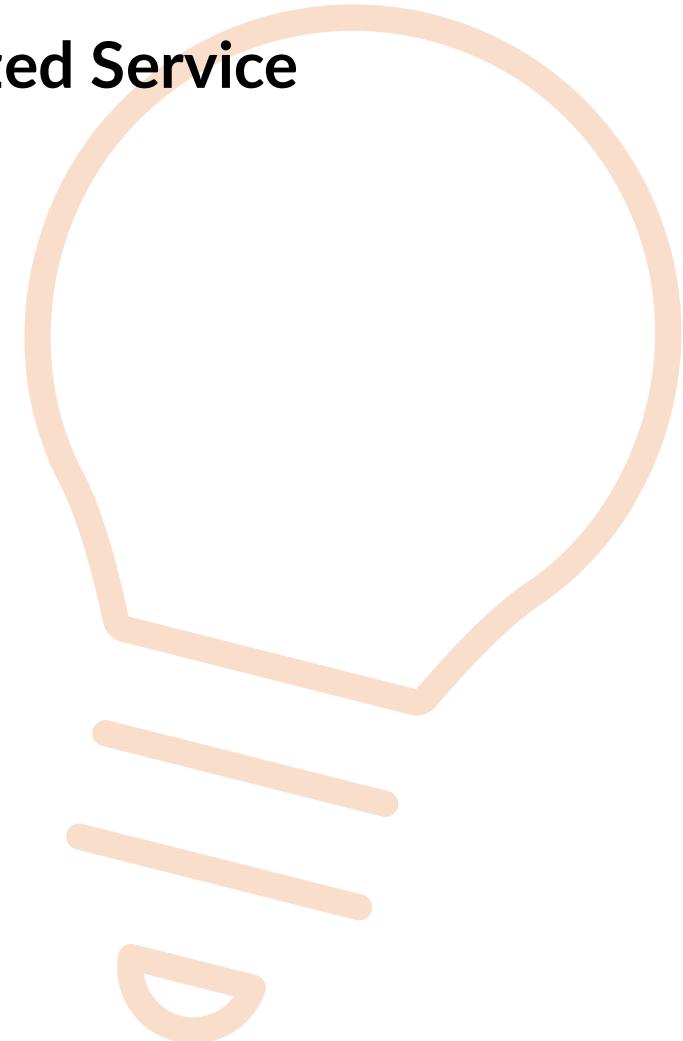


Knowledge Check – Unauthorized Service Exception



Which of the following does NOT cause an Unauthorized Service exception? Select one.

- A. Authorization is missing.
- B. Incorrect Recipient on visit.
- C. Incorrect Service Code on visit.
- D. Authorization is incorrect.



Creating a Manual Visit

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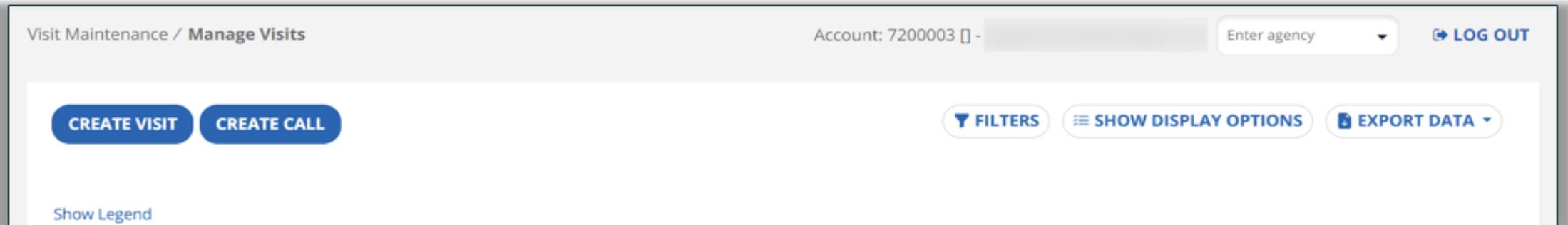
What if I Need to Create a Visit?



Cause: DCW/DSP should capture all visits, but sometimes circumstances arise, such as the phone's battery has died, or rushing between visits.

Example: DCW/DSP does not clock in/out for a visit.

Create Visit: Create a manual visit using **Create Visit** button.





Steps to Creating a Manual Visit



1. Navigate to Visit Maintenance and select **Create Visit**.
2. Use the filters icon to locate the recipient; once recipient is found and selected, select **Next**.
3. Use the filters icon to locate DCW/DSP; once DCW/DSP is found and selected, select **Next**.
4. Enter the visit details, which includes **Call Date**, **Call In Time**, **Call Out Time**, **Location**, **Service**.
5. Select **Reason Code**, enter **Reason Note** (optional), and select **Save**.



Creating a Manual Visit Demo



CREATE VISIT

CREATE CALL

There are 0 records matching the provided search criteria

Navigate Modules

Dashboard

Recipients

DCW/Employees

Scheduling

Visit Maintenance

Reports

XREF

Security

Messaging

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

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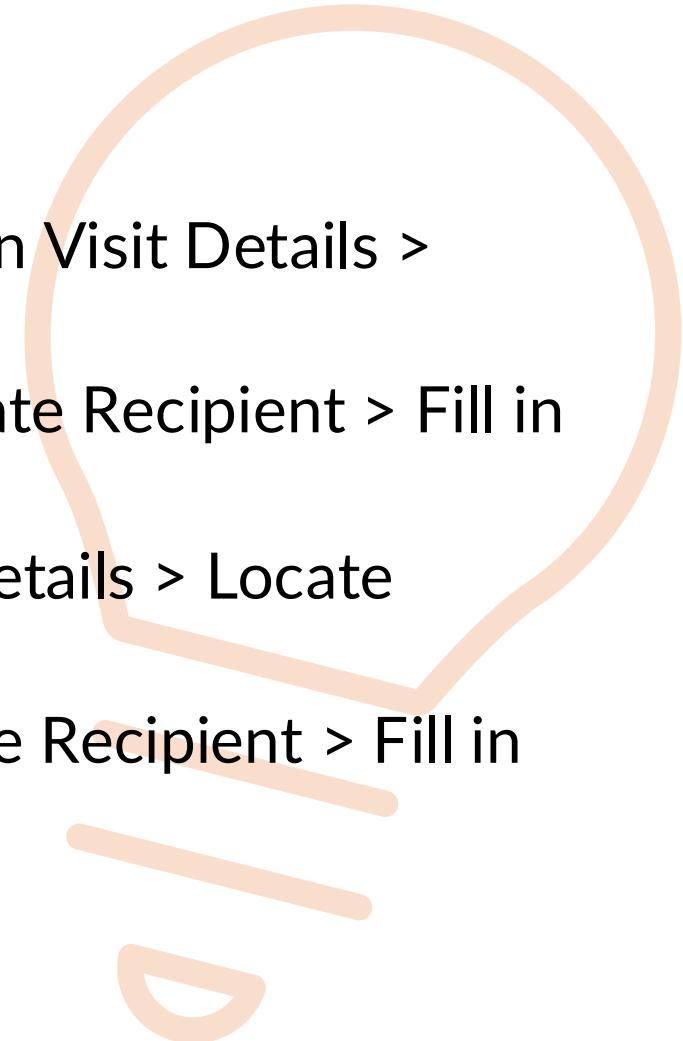


Knowledge Check – Creating a Manual Visit



What are the steps to creating a manual visit?

- A. Navigate to Visit Maintenance > Create Visit > Fill in Visit Details > Locate Recipient.
- B. Navigate to Visit Maintenance > Create Visit > Locate Recipient > Fill in Visit Details.
- C. Navigate to Recipient > Create Visit > Fill in Visit Details > Locate Recipient.
- D. Navigate to DCW/Employee > Create Visit > Locate Recipient > Fill in Visit Details.





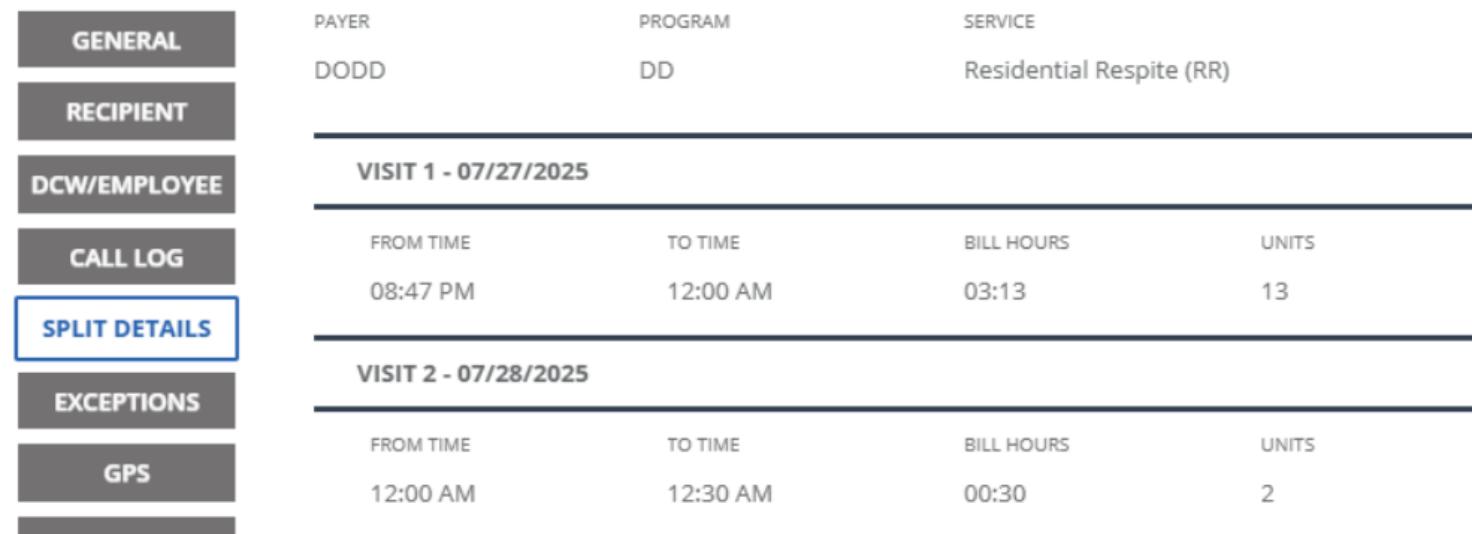
Reminder: Overnight Visits



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

Example: 8:45 pm – 12:30 am

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



The screenshot shows a software interface with a sidebar on the left containing buttons for General, Recipient, DCW/Employee, Call Log, Split Details (which is highlighted in blue), Exceptions, and GPS. The main area displays visit details for two days:

PAYER	PROGRAM	SERVICE
DODD	DD	Residential Respite (RR)

VISIT 1 - 07/27/2025			
FROM TIME	TO TIME	BILL HOURS	UNITS
08:47 PM	12:00 AM	03:13	13

VISIT 2 - 07/28/2025			
FROM TIME	TO TIME	BILL HOURS	UNITS
12:00 AM	12:30 AM	00:30	2

[Unit Conversion Table](#)



Key Takeaways



Key Takeaways



- Ensure that all visits are in a verified status prior to submitting claims.
- Perform Visit Maintenance regularly; resolve exceptions. Independent Providers will also need to perform visit maintenance regularly in Sandata EVV Portal.
- Create missing visits manually prior to submitting claims.
- ***Reminder:*** Alt EVV providers will perform Visit Maintenance in their Alt EVV system. This information is sent to Sandata EVV. Please log in to the Sandata Aggregator to confirm that visits are in a verified status prior to submitting claims.



Resources



Provider Resources



- [Ohio User Guides](#)

Top Visit Maintenance Errors and How to Resolve:

- [Managing Exceptions](#)
- [Updating an Unknown Recipient](#)
- [Adjusting Call Times and Dates](#)
- [Ohio Claims Validation: Handling Claims Denials- Sandata Technologies](#)

Visit Maintenance:

- [Visit Maintenance](#)

DODD Resources:

- [DODD Workflow](#)
- [Recorded Webinars](#)
- [DODD Webpage](#)

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: OHAAltEVV@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

- [Ohio Department of Medicaid Website](#)
- [Electronic Visit Verification](#)



DCW/Employee Training Resource



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



Sandata
Get more right from the start

Sandata News New User Sign Up Submit a request Sign in

Search

Sandata On-Demand / Sandata Learn Product Help **Payer Programs** Caregiver and CDS Client Library EVV Vendor Solutions Provider

Sandata Technologies / Payer Programs / Ohio (OH ODM) / Ohio User Guides / Visit Capture / Sandata Mobile Connect (SMC) English

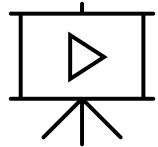
Sandata Mobile Connect (SMC) English

Follow

- Sandata Mobile Connect Login
- Starting a Scheduled Sandata Mobile Connect Visit
- Completing a Sandata Mobile Connect Visit
- Starting an Unscheduled Sandata Mobile Connect Visit
- Starting an Unknown Sandata Mobile Connect Visit



DCW/Employee 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



The screenshot shows the Sandata website interface. At the top, there is a navigation bar with links for 'Sadata News', 'New User Sign Up', 'Submit a request', and 'Sign in'. Below the navigation bar, there is a search bar with a magnifying glass icon and a 'Search' button. The main content area features the 'Sadata' logo and the tagline 'Get more right from the start'. A 'Search' bar is present. Below the search bar, there are several navigation links: 'Sandata On-Demand / Sandata Learn', 'Product Help', 'Payer Programs' (which is highlighted in blue), 'Caregiver and CDS Client Library', 'EVV Vendor Solutions', and 'Provider'. A 'Follow' button is also visible. The main content area is titled 'Ohio Direct Care Worker Video Library' and includes a sub-section titled 'Ohio (OH ODM) / Ohio Instructional Videos'. A descriptive text states: 'In this video library, you will learn how to use the Sandata Mobile Connect App to start and complete your EVV visits.' Below this text, there is a video thumbnail with the title 'OH Ohio Direct Care Worker Video Channel' and a 'Play' button.



Questions?



Register for Upcoming Trainings

THANKS FOR
ATTENDING!



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