

# Our Webinar Will Begin Shortly

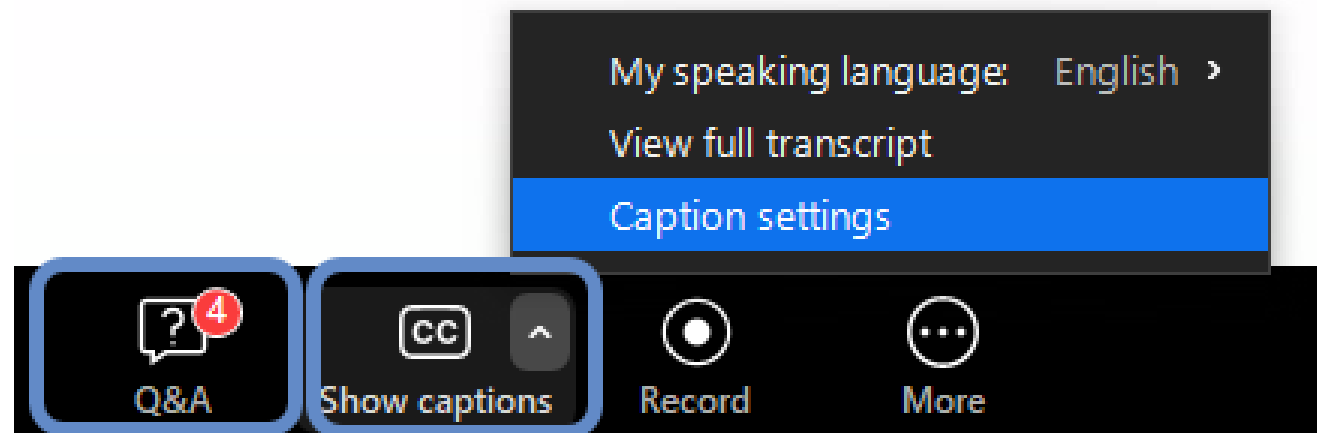
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# Accessibility Options

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



The screenshot shows a video player interface with a dark background. At the top right, a menu is open with the following options: "My speaking language: English" (with a dropdown arrow), "View full transcript", and "Caption settings" (which is highlighted in blue). At the bottom of the screen, there is a row of four buttons: "Q&A" (with a question mark icon and a red circle containing the number 4), "Show captions" (with a "CC" icon and an upward arrow icon), "Record" (with a camera icon), and "More" (with a three-dot menu icon). The "Q&A" and "Show captions" buttons are highlighted with blue rounded rectangles.



## Meet the Trainer!



Alejandra Cordova



- **Role: Sponsored Provider Training Specialist**
- **Tenure at HHAeXchange: 3years**
- **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

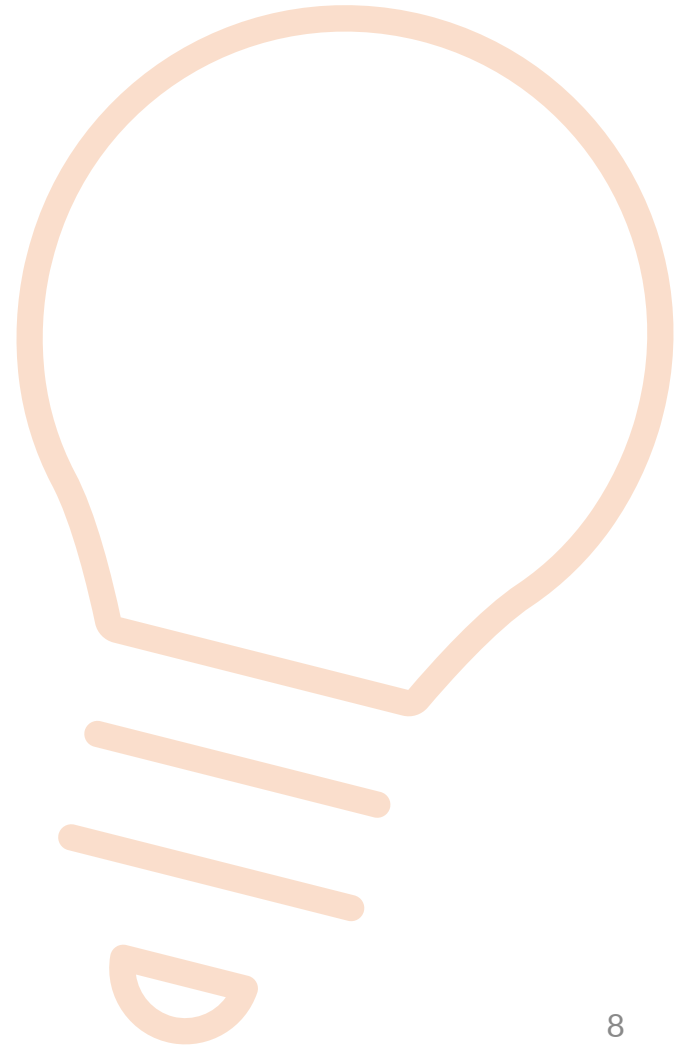
# Knowledge Checks

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



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

# 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 EVV

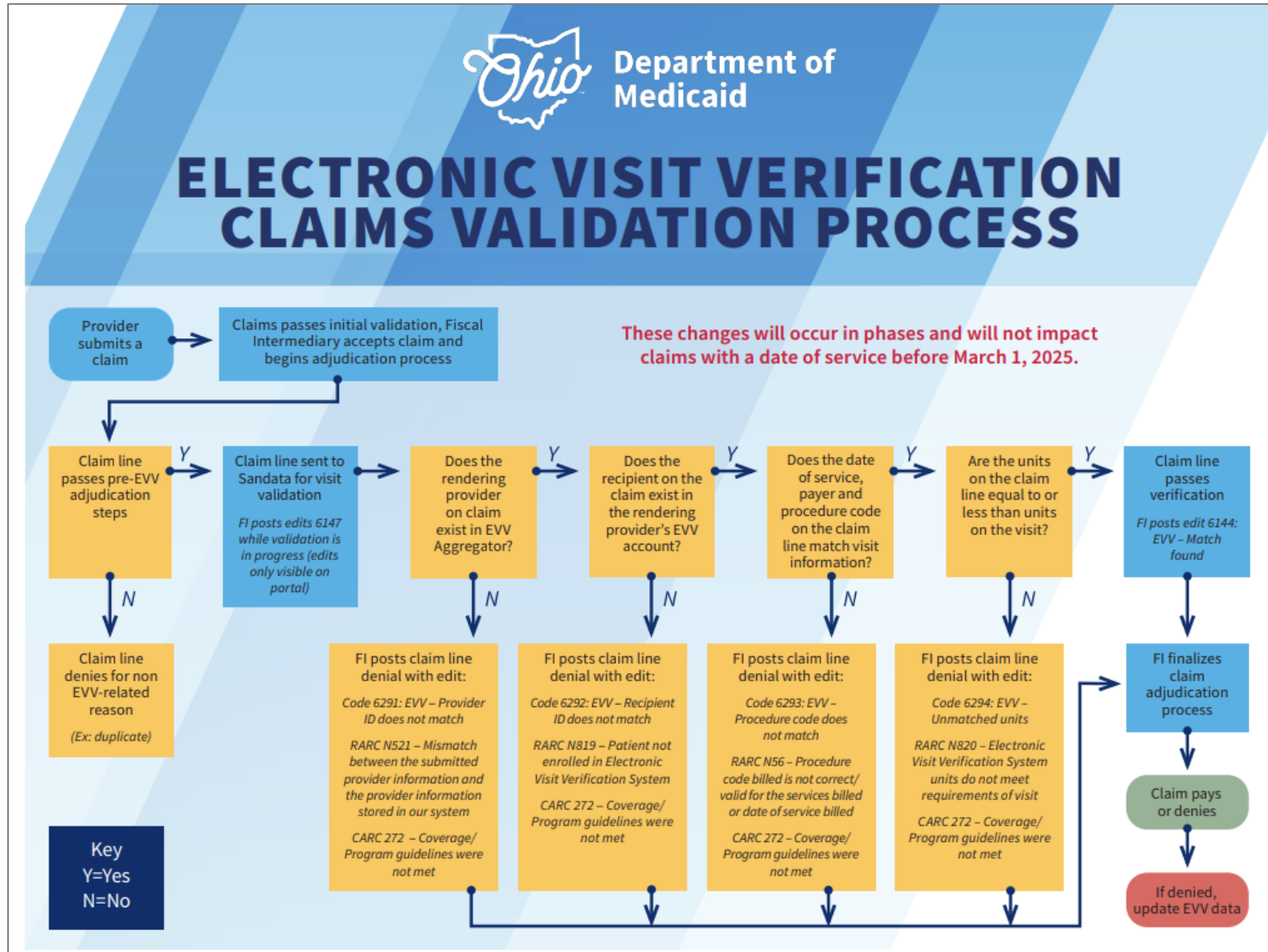
Facility-based services

Structured Family Caregiving

Services requiring EVV delivered by  
exempted live-in caregivers

For a comprehensive list of services requiring EVV 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

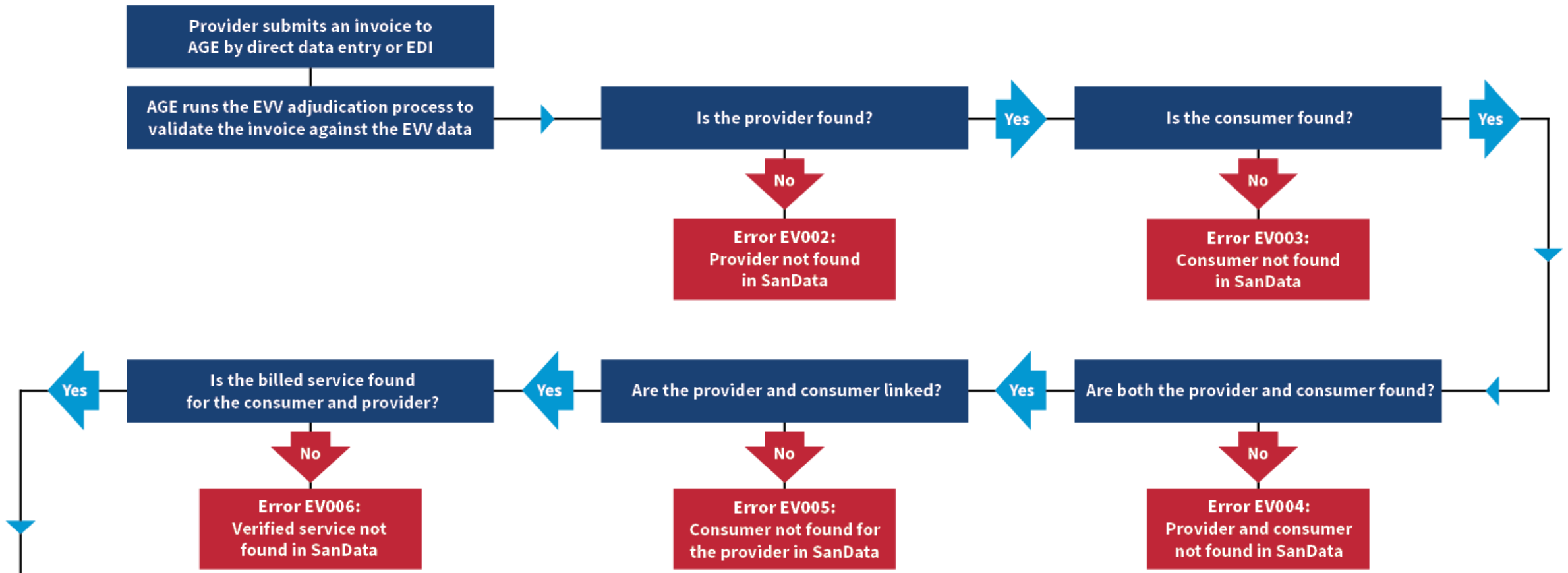


## **NOT Subject to EVV**

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

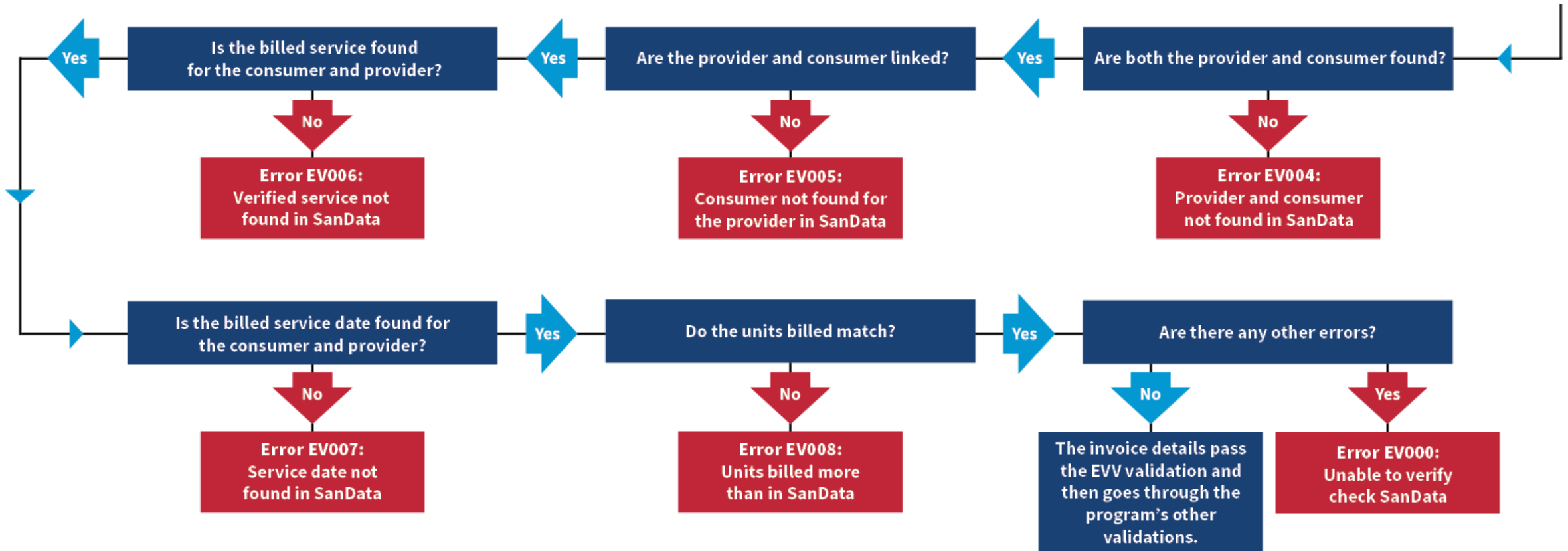
For a comprehensive list of all services requiring EVV, please refer to [OAC 5160-32-01](#).

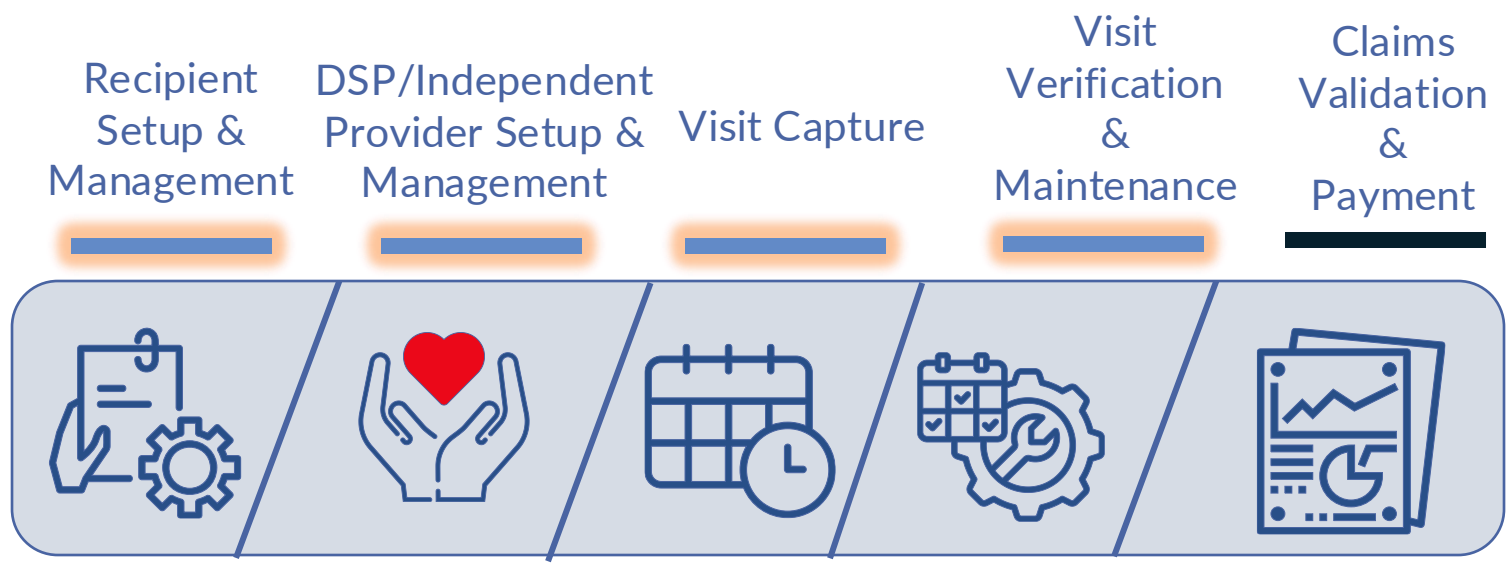
# Ohio Department of Aging Electronic Visit Verification Claims Validation Process (1 of 2)





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







# Agenda

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



# Visit Maintenance Overview

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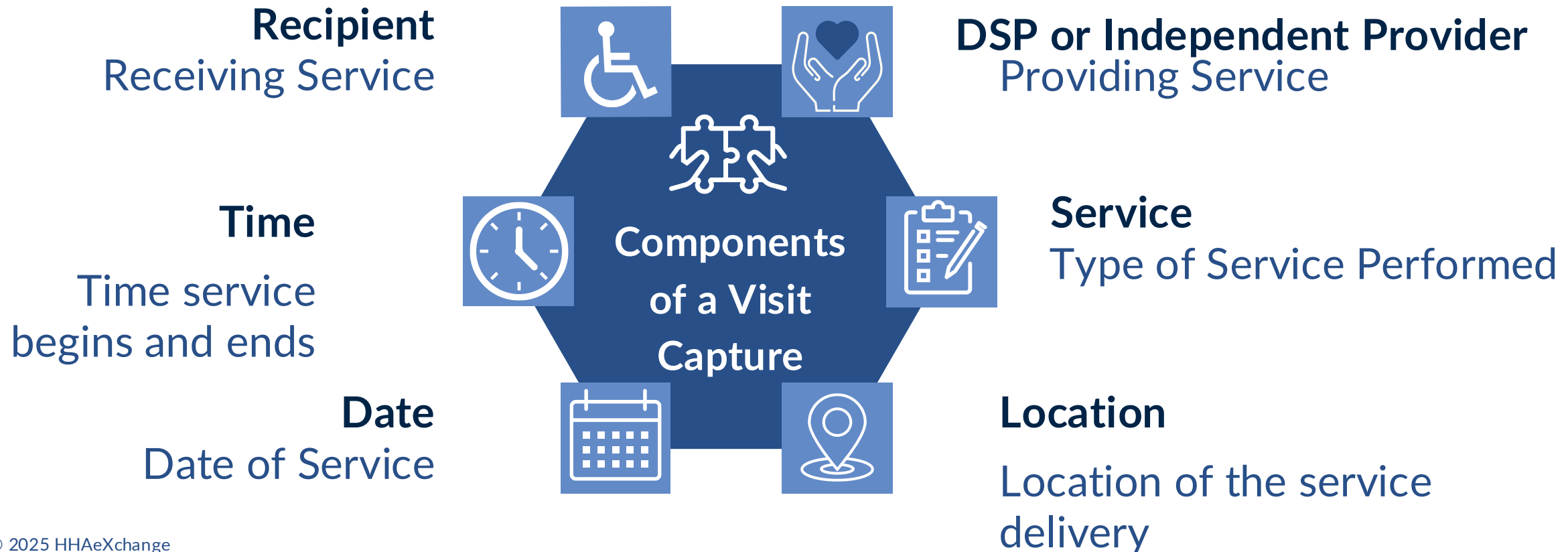
For a comprehensive list of services requiring EVV under ODM waivers, please refer to [OAC 5160-32-01](#).



# 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.



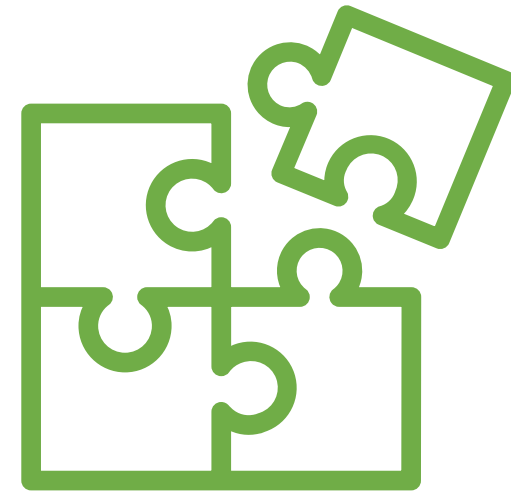
# > What Happens During the Claims Validation Process?



**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.

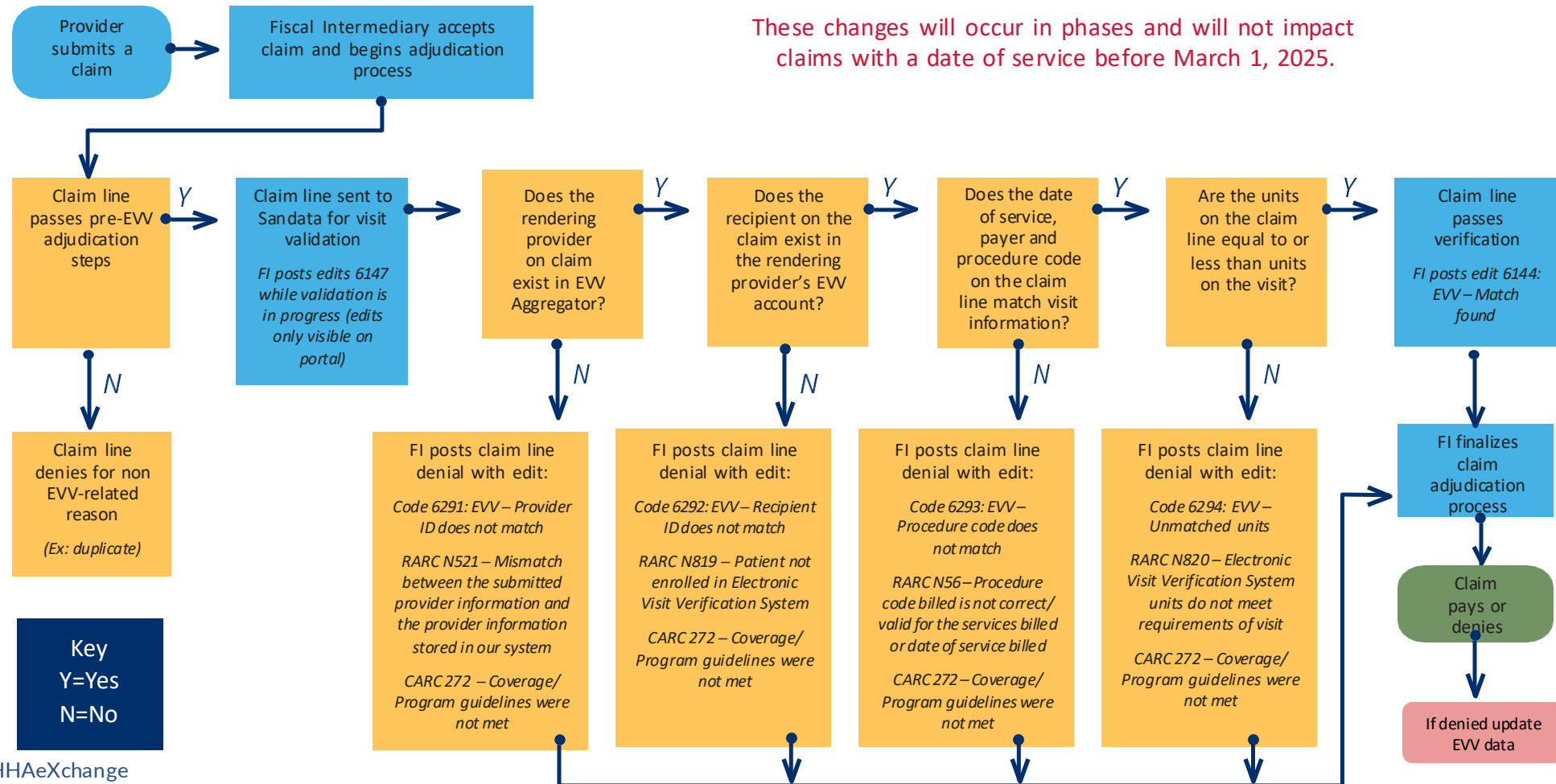




# Electronic Visit Verification Claims Validation Process



## ELECTRONIC VISIT VERIFICATION CLAIMS VALIDATION PROCESS





# List of Services Billed to (AGE) PASSPORT Waiver Services



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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



## **NOT Subject to EVV**

Services that do not include personal care, like  
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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](#).

# > 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

The screenshot shows the Sandata Mobile Connect login interface. At the top is the Sandata logo with the tagline 'Mobile Connect'. Below the logo are two input fields: the first contains the email 'Cjones2025@yopmail.com' and the second is labeled 'Password' with an eye icon for toggling visibility. A 'Remember Me' toggle switch is positioned below the password field. A large white 'Sign In' button is centered below the inputs. Underneath the button are links for 'Reset Password' and '3.3.1'. At the bottom of the main content area is a link for 'User Manual'. A green banner at the very bottom of the screen contains the text 'Starting a visit with an unknown Recipient/Medicaid ID'.



# What Happens during the Claims Validation Process?



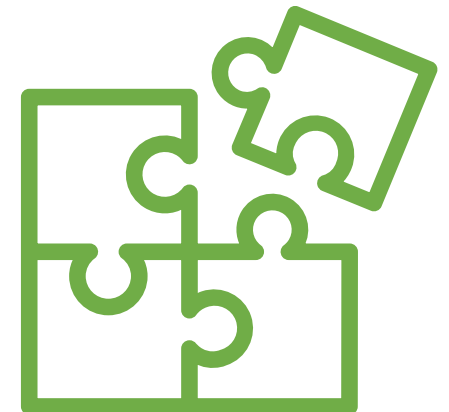
**Step 2:** Provider performs visit maintenance and resolves any EVV exceptions to turn visit into a verified status.



**Step 3:** Provider submits claims.

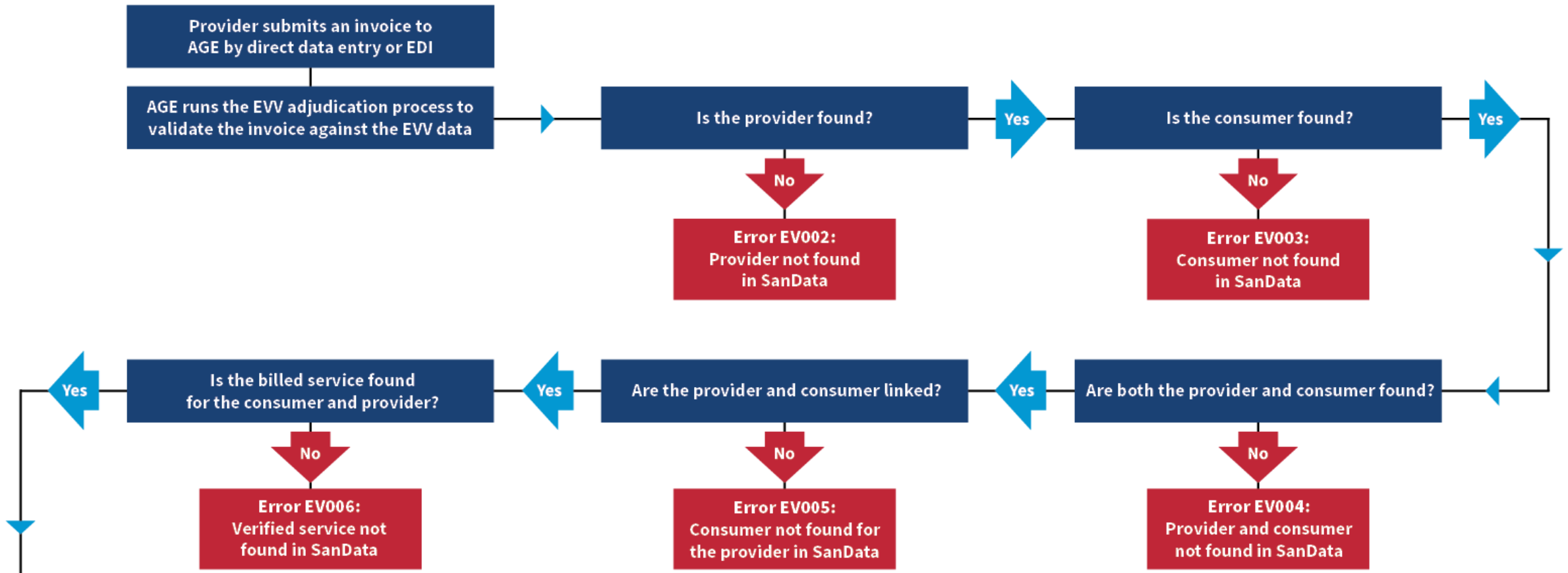


**Step 4:** Payer can now match claims to EVV visits.



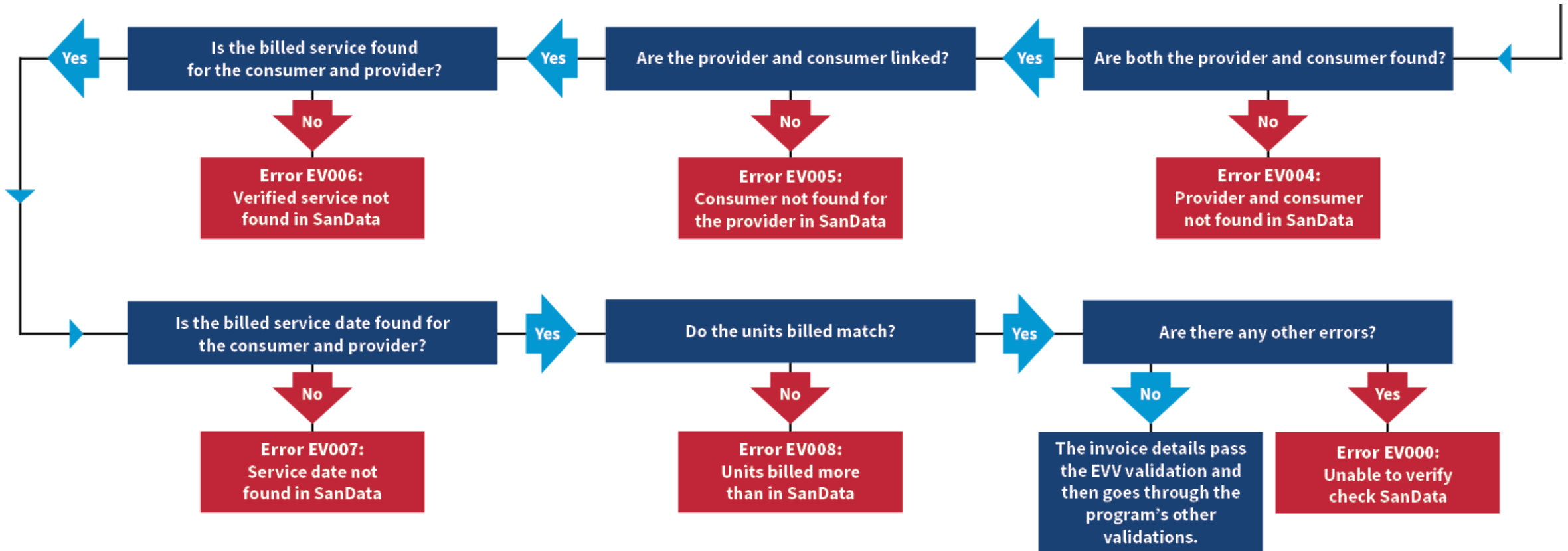


# Ohio Department of Aging Electronic Visit Verification Claims Validation Process (1 of 2)





# 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 VISITCREATE 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

Multiple Recipient with the same phone

Visit Created Manually

Task(s) Exist for Visit

FWV Device Indicator

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.

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	
(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

<b>Reason Code *</b>	<b>Reason Note</b>	<b>SAVE</b>
<div>Select Reason Code ▲</div> <div>Select Reason Code</div> <div>99 Documentation on file supports manual change</div>	<div>DCW forgot to clock in - verified time with rec...</div>	

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





# Visit Maintenance Overview Demo

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





## Knowledge Check – Visit Maintenance Overview



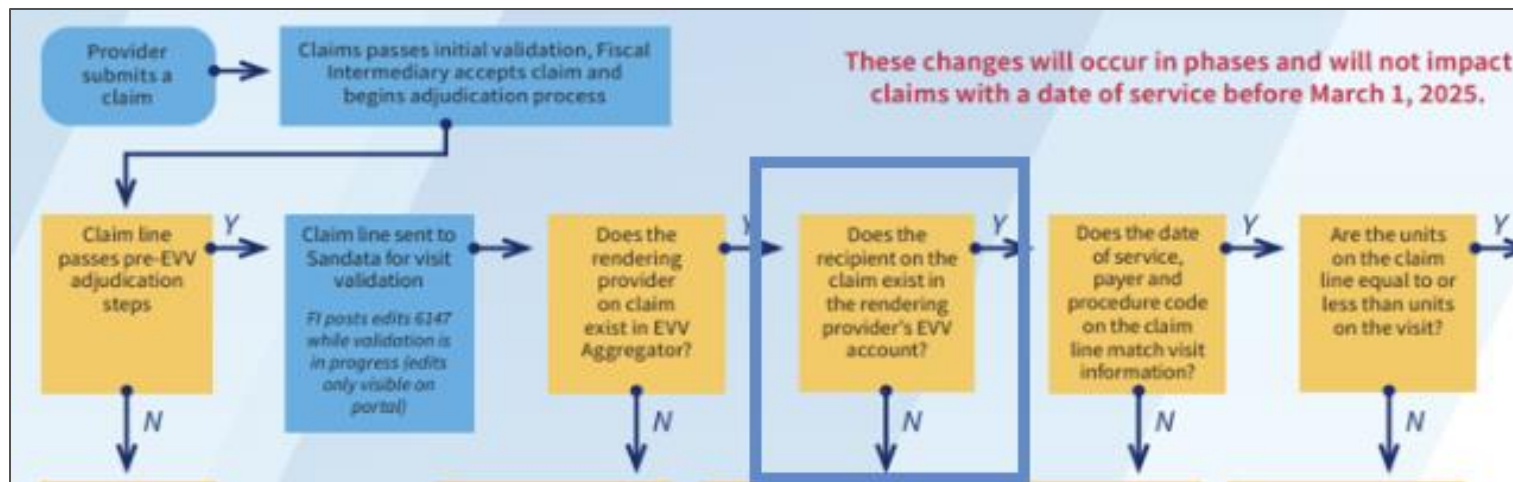
I'm trying to locate my visits from last week, but when I navigate to the Visit Maintenance screen, no data appears. What should I do to make sure this information is visible?

- 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.

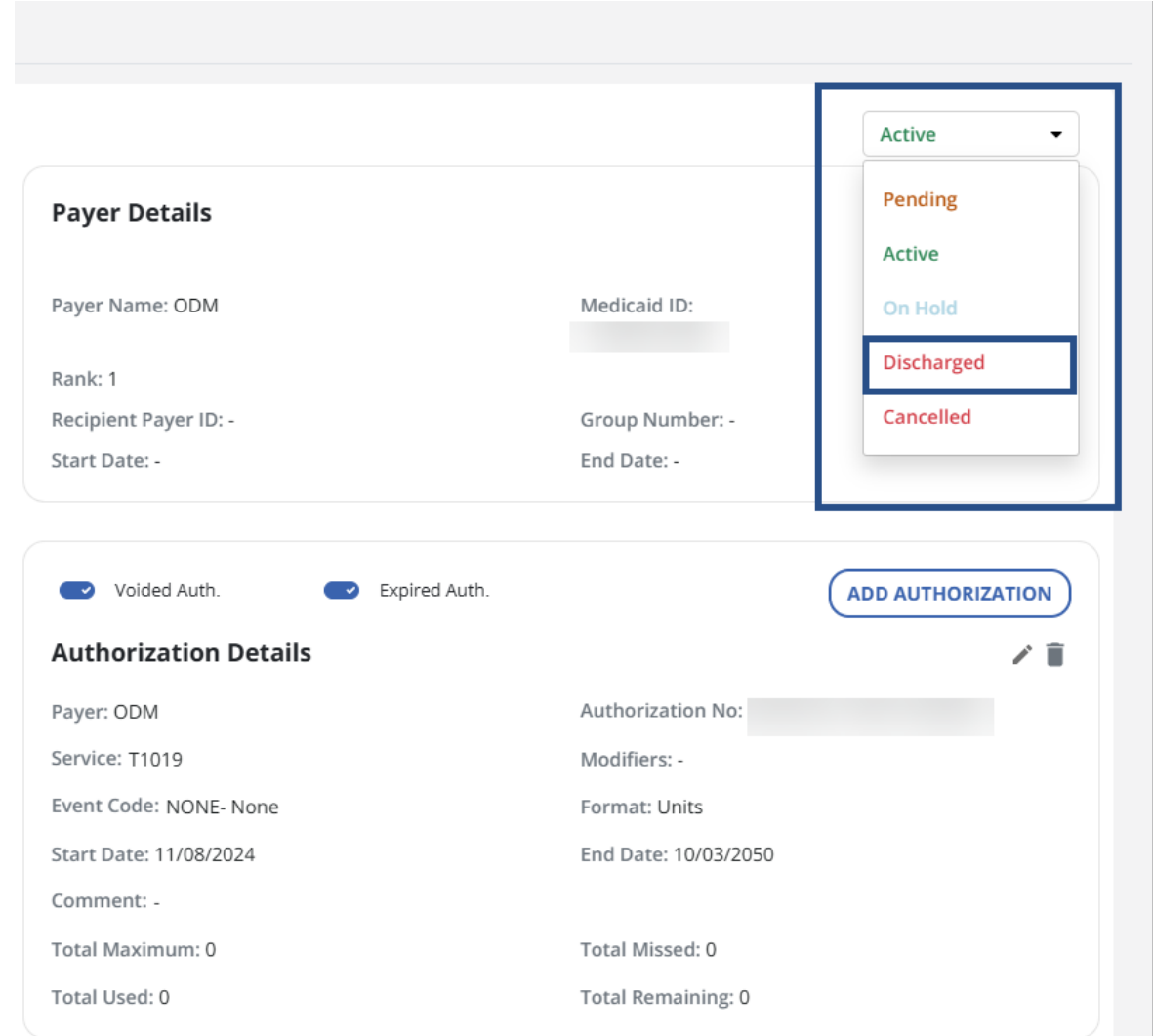
The screenshot displays the Sandata Visit Maintenance interface. The main table lists visits with columns for Recipient Name, DCW/Employee Name, Service, Visit Date, Scheduled Time In/Out, Scheduled Hours, Call In/Out, Call Hours, Adjusted In/Out, and Adjusted Hours. The table shows four entries for visits on 10/31/2025. A total of 02:22 is shown at the bottom of the table. The filters sidebar on the right includes fields for From Date, To Date, Recipient, DCW/Employee, Payer, Program, Service, Category, Visit Status, Recipient Medicaid ID, and Filter Visits By. The Filter Visits By dropdown is open, showing Exception Types, with Missing Medicaid ID selected. The sidebar also includes checkboxes for Select All, Late In-Call, Missing Location, Missing Medicaid ID (checked), and Missing Service.

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
HHAAExchange, 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
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
Sandata, 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											

## 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.

### [Creating a New Recipient](#)



The screenshot displays the Recipient Management interface. The top section, 'Payer Details', includes fields for Payer Name (ODM), Rank (1), Recipient Payer ID (-), Start Date (-), Medicaid ID (redacted), Group Number (-), and End Date (-). A dropdown menu for Status is open, showing options: Active, Pending, Active, On Hold, Discharged (highlighted with a blue border), and Cancelled. The bottom section, 'Authorization Details', includes a toggle for 'Voided Auth.' (checked) and 'Expired Auth.' (checked), an 'ADD AUTHORIZATION' button, and fields for 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), and Total Remaining (0).

# 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"/>		
Unknown Recipients																

***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



# 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



CREATE VISIT

CREATE CALL

FILTERS

SHOW DISPLAY OPTIONS

EXPORT DATA

Show Legend

APPROVE ALL

DISAPPROVE ALL

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
HHAEExchange, 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	
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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			[ --- ]	Incomplete	<input type="checkbox"/>	0	

# 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**

Sandata EVV | Manage Visits

evv-ui.sandata.com/visit-maintenance

Sandata Home Care

Navigate Modules

Dashboard

Recipients

DCW/Employees

Scheduling

Visit Maintenance

Reports

XREF

Security

Messaging

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
HHAAExchange, 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	
Sandata, Sandy	Dowdrick, Eric	RN Consultation (T1001)	10/31/2025				06:00 AM	07:00 AM	01:00	06:00 AM	07:00 AM	
Sandata, 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

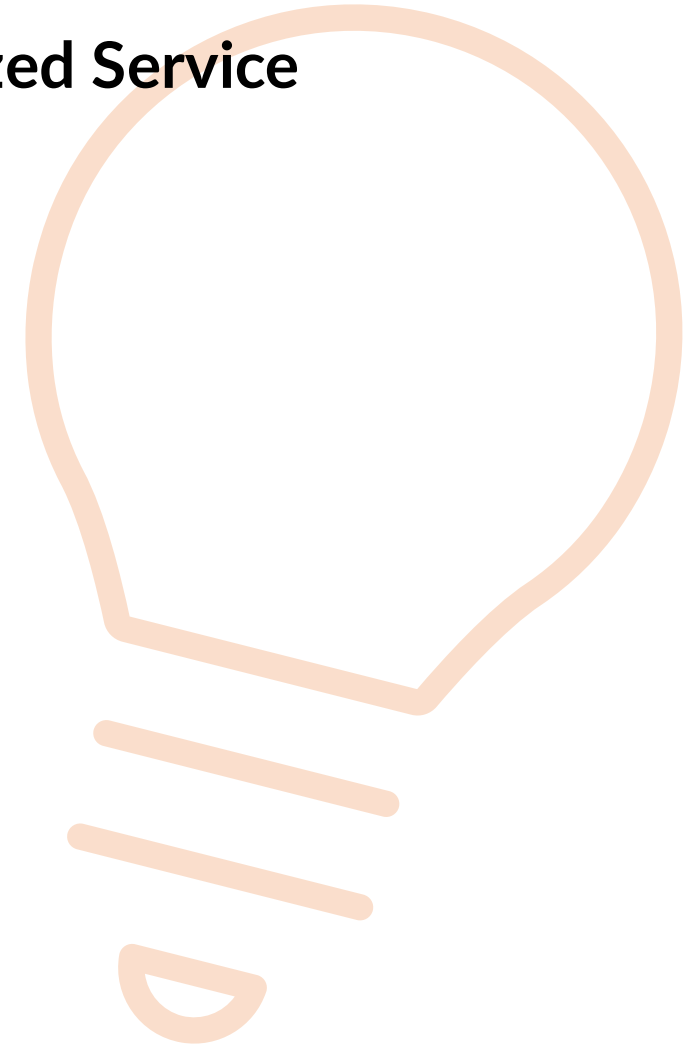


## Knowledge Check – Unauthorized Service Exception



**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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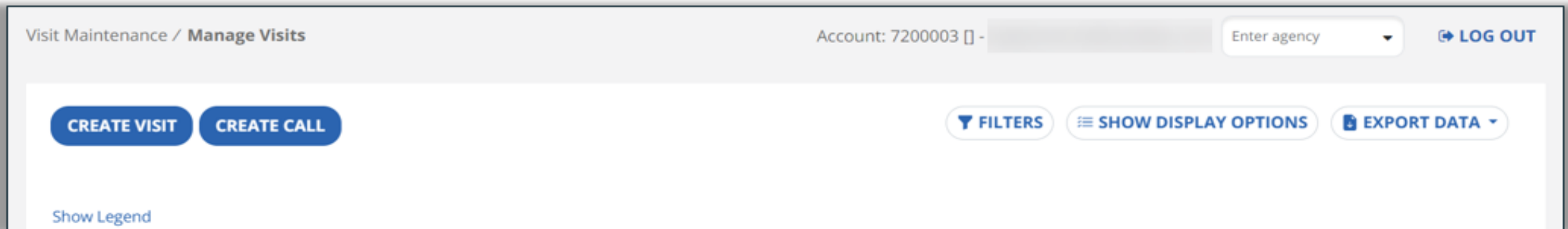
## What if I Need to Create a Visit?



**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.



Visit Maintenance / Manage Visits

Account: 7200003 -  Enter agency LOG OUT

[CREATE VISIT](#) [CREATE CALL](#) [FILTERS](#) [SHOW DISPLAY OPTIONS](#) [EXPORT DATA](#)

[Show Legend](#)

# 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

FILTERS

CREATE VISIT

CREATE CALL

There are no records matching the provided search criteria

Need some guidance? Use this<sup>x</sup>  
OH User Training Guide!

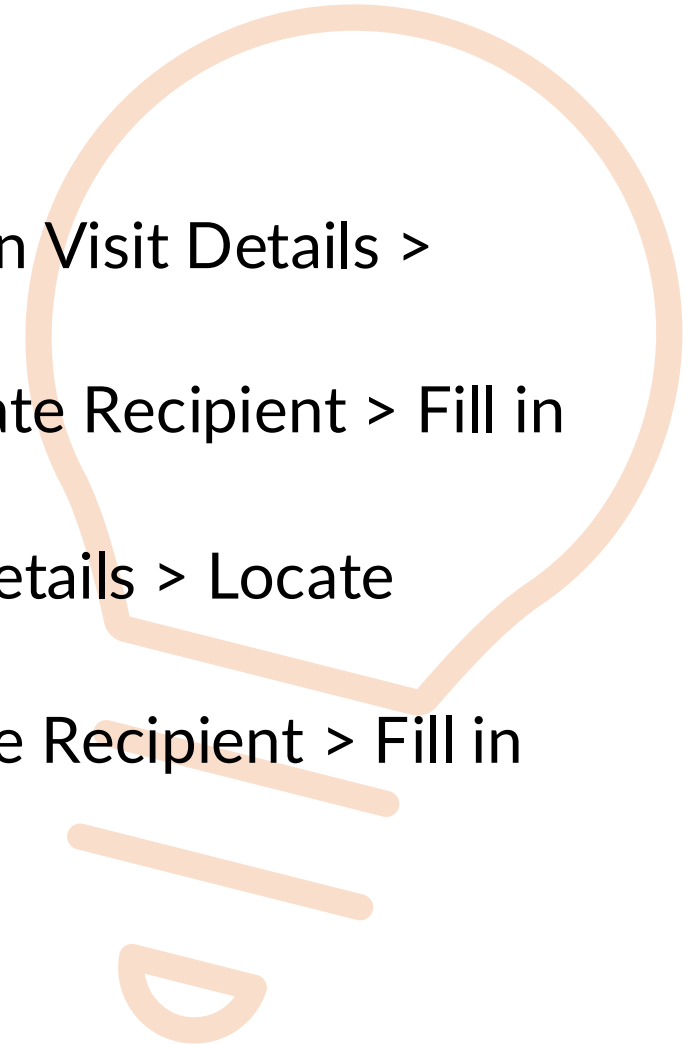


## Knowledge Check – Creating a Manual Visit



**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)

GENERAL

RECIPIENT

DCW/EMPLOYEE

CALL LOG

SPLIT DETAILS

EXCEPTIONS

GPS

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:

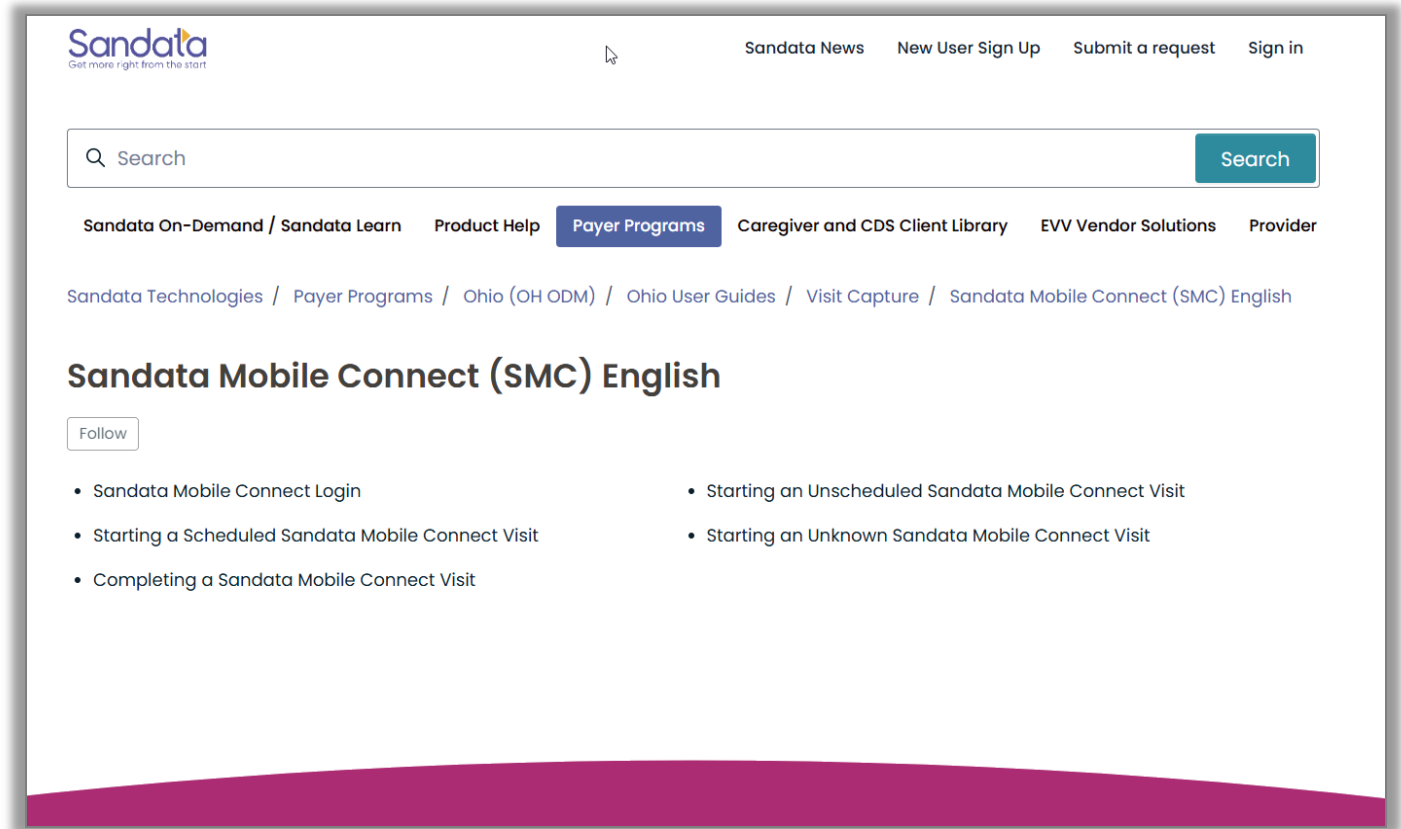
- Phone: 1-844-289-4246
- Email: [OHAltEVV@Sandata.com](mailto:OHAltEVV@Sandata.com)
- Include the following in the email:
  - ✓ Provider Medicaid ID
  - ✓ Alt EVV Vendor
  - ✓ Include Examples (Universal Unique Identifier, copy of payloads) - **ensure this is sent securely via Zendesk portal if there is PHI data.**

## Ohio Department of Medicaid

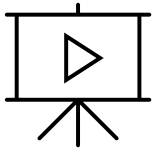
- [Ohio Department of Medicaid Website](#)
- [Electronic Visit Verification](#)



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

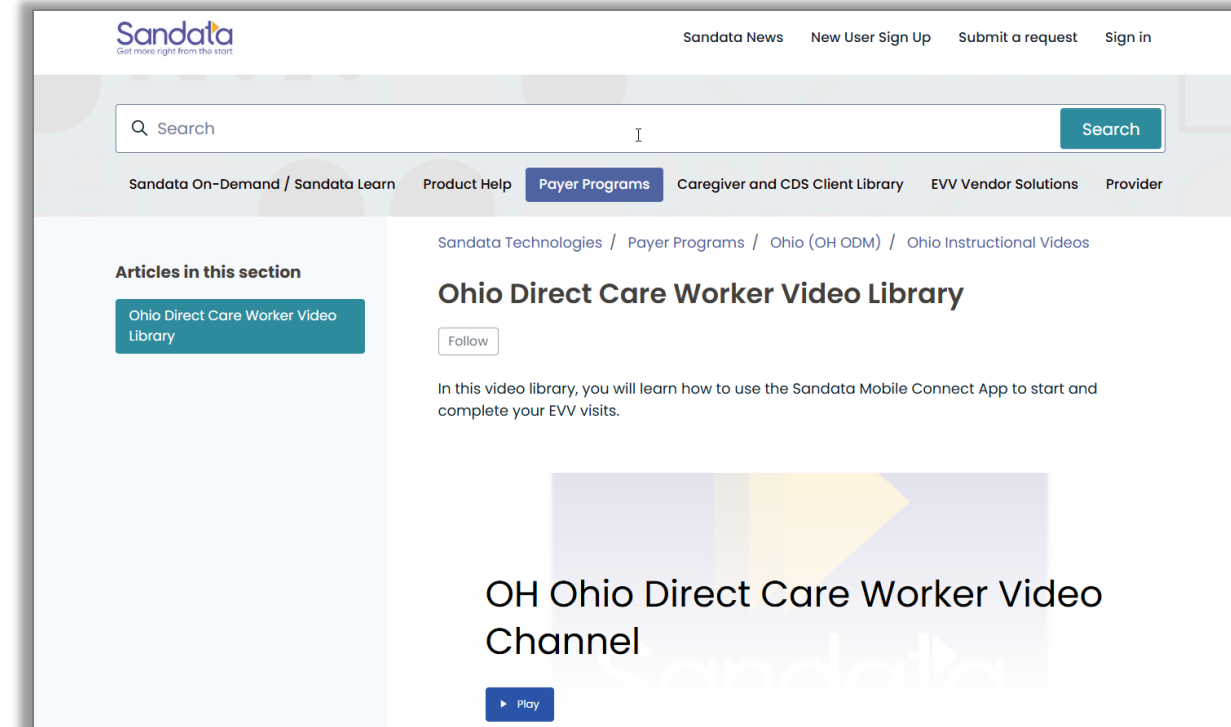


# DCW/Employee Video Library



- [Ohio Direct Care Worker Video Library](#)

- Videos on:
  - Starting and completing a visit
  - Resetting and changing a password
  - TVV call in and out





# Questions?



Register for Upcoming Trainings

**THANKS FOR  
ATTENDING!**



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