Our Webinar Will Begin Shortly

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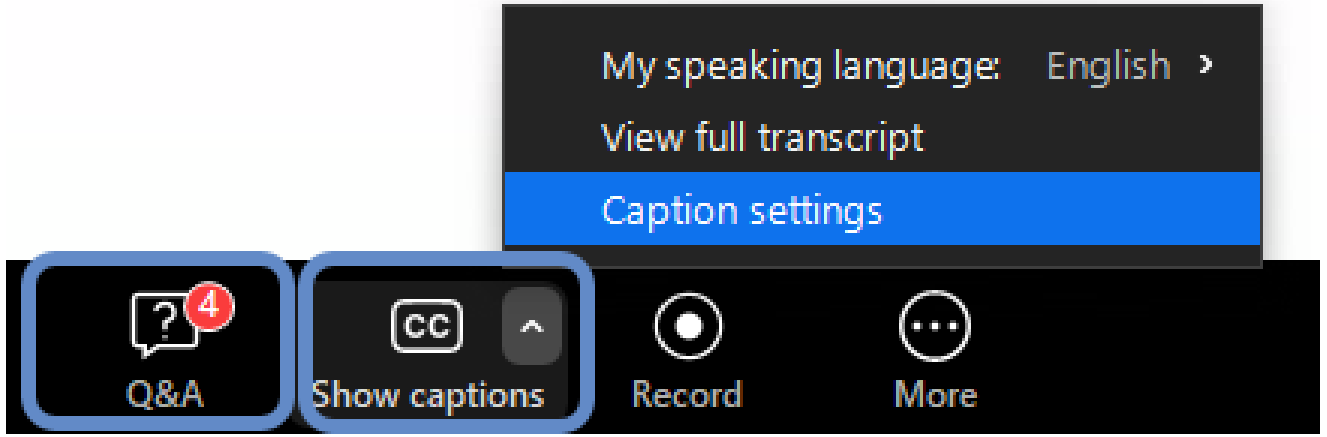

Meet the Trainer!

Alejandra Cordova

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

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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.

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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		

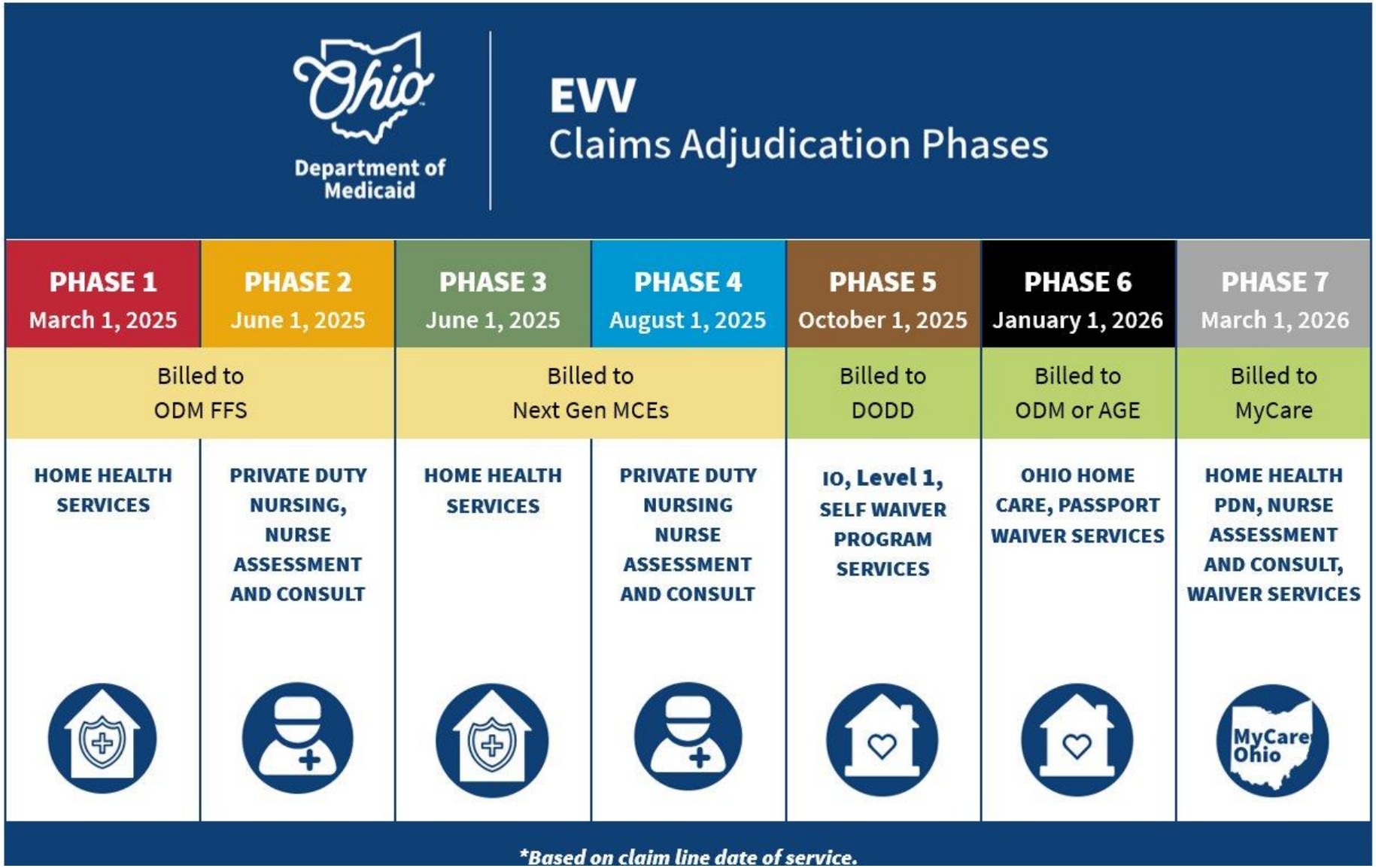
Knowledge Checks

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



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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.

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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.

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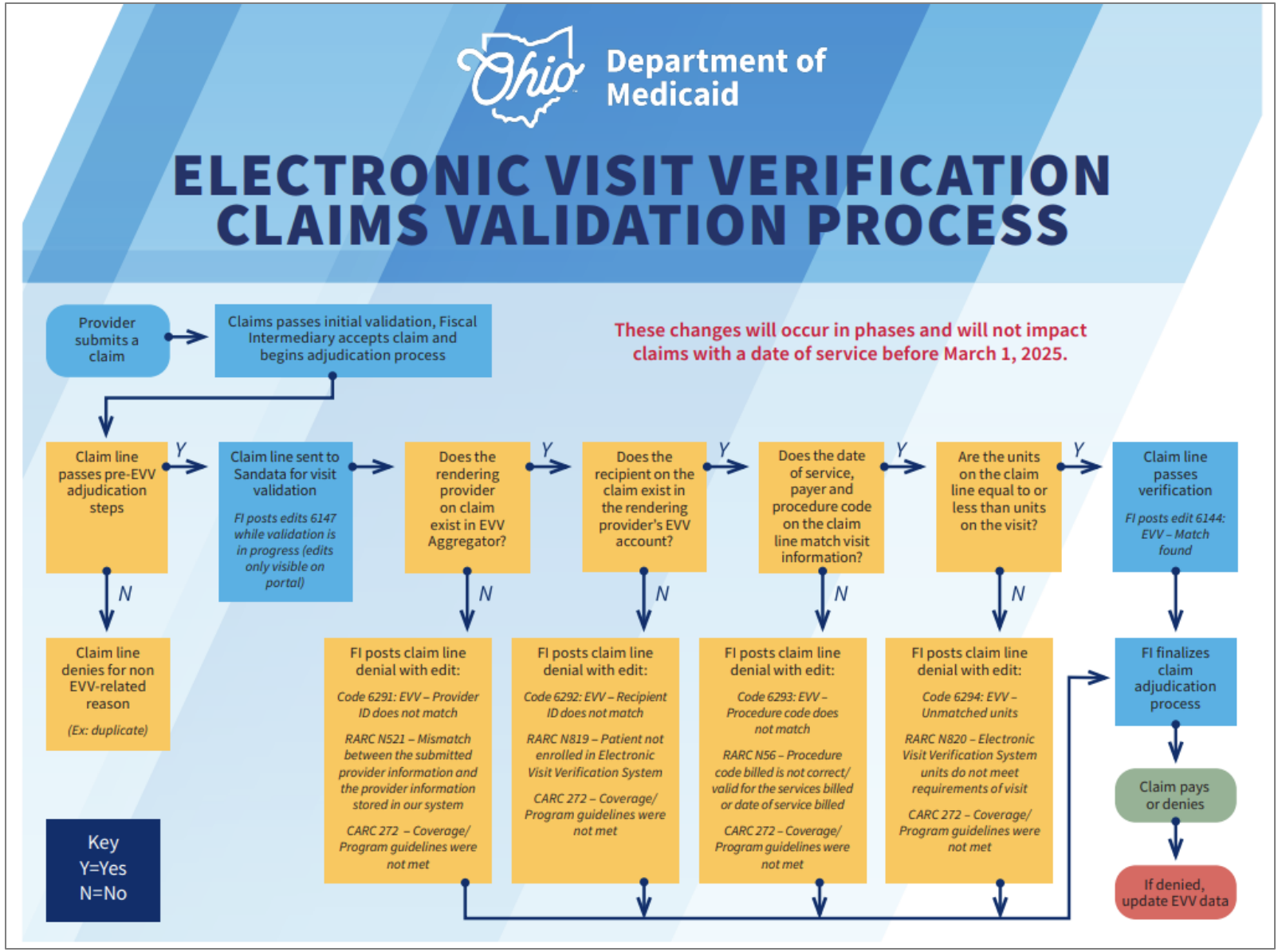
Electronic Visit Verification Claims Validation Process



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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

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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

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.

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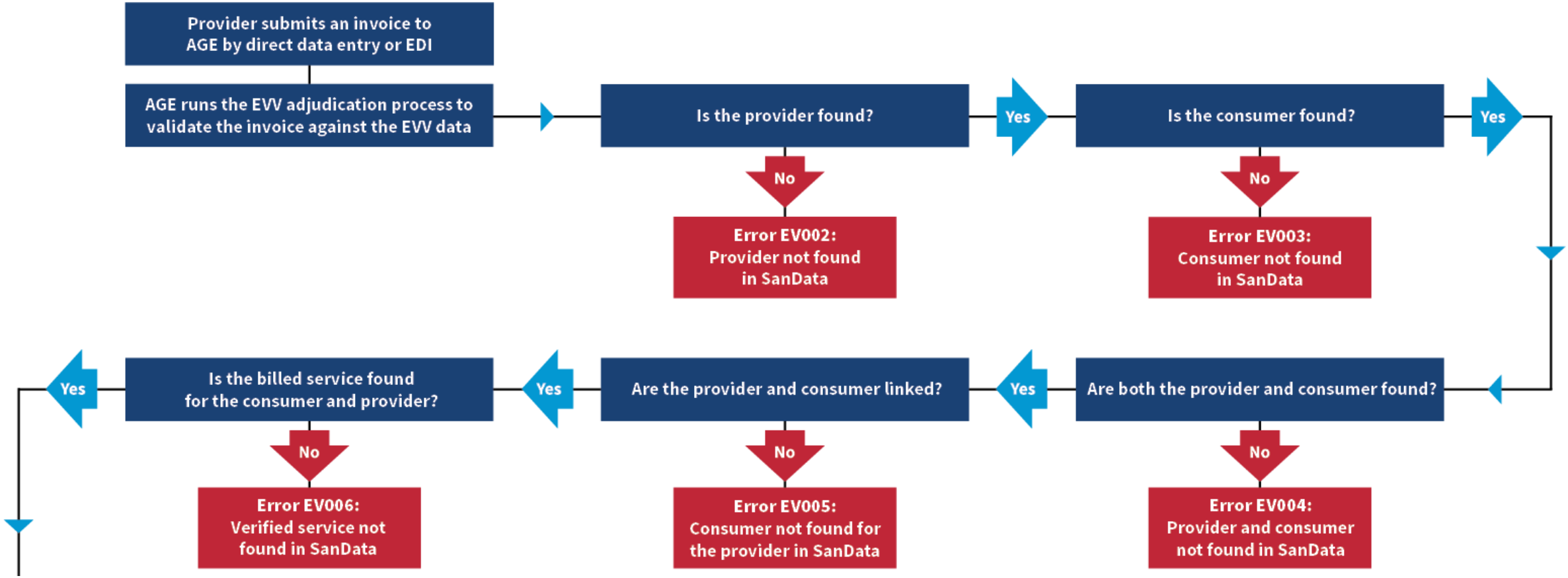
Ohio Department of Aging Electronic Visit Verification Claims Validation Process (1 of 2)



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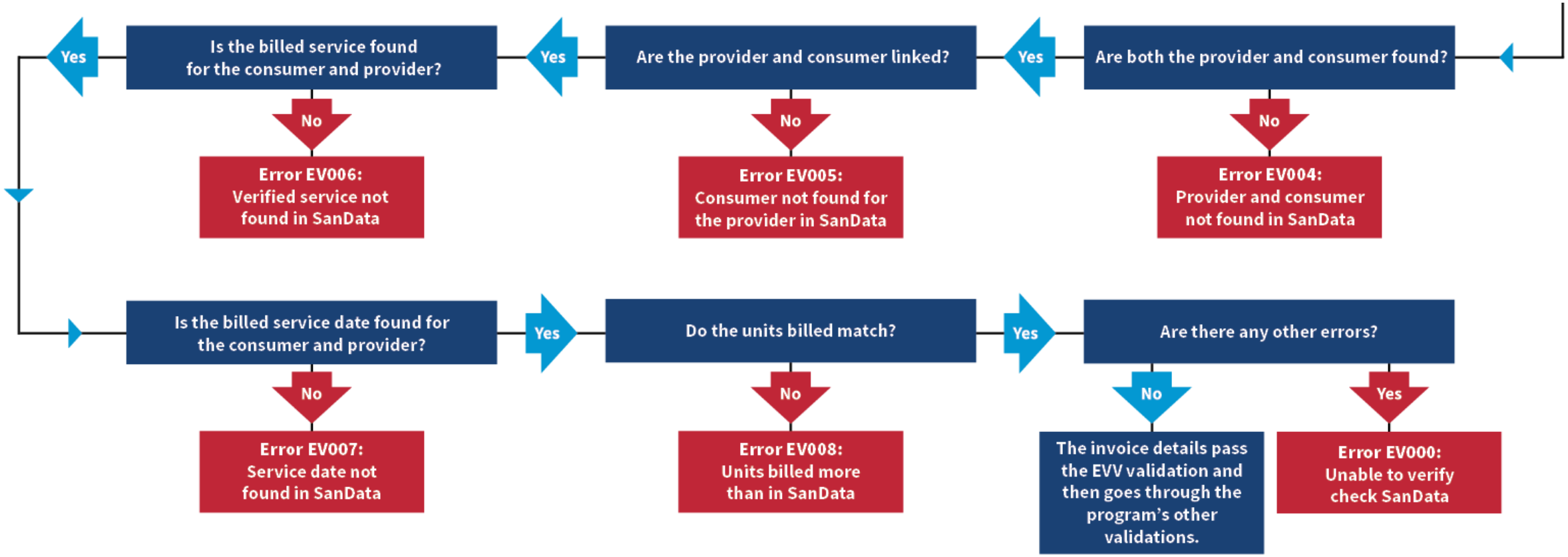
Ohio Department of Aging Electronic Visit Verification Claims Validation Process (2 of 2)



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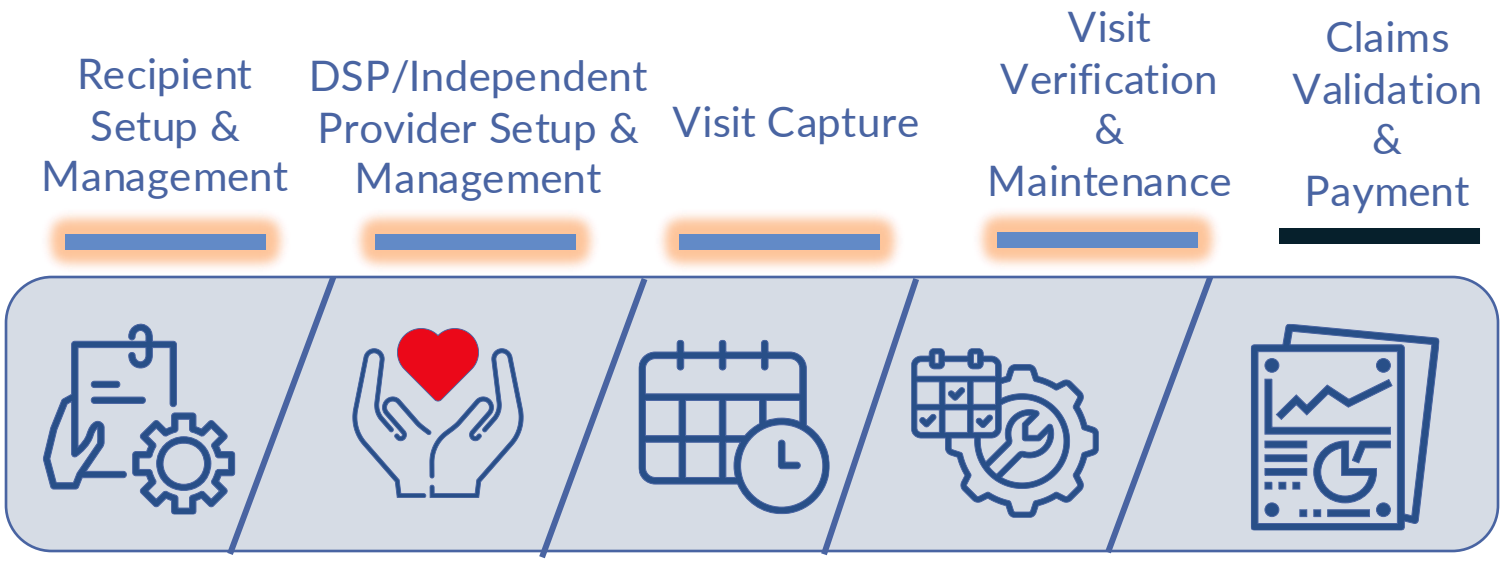
EVV Tracker



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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

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Visit Maintenance Overview

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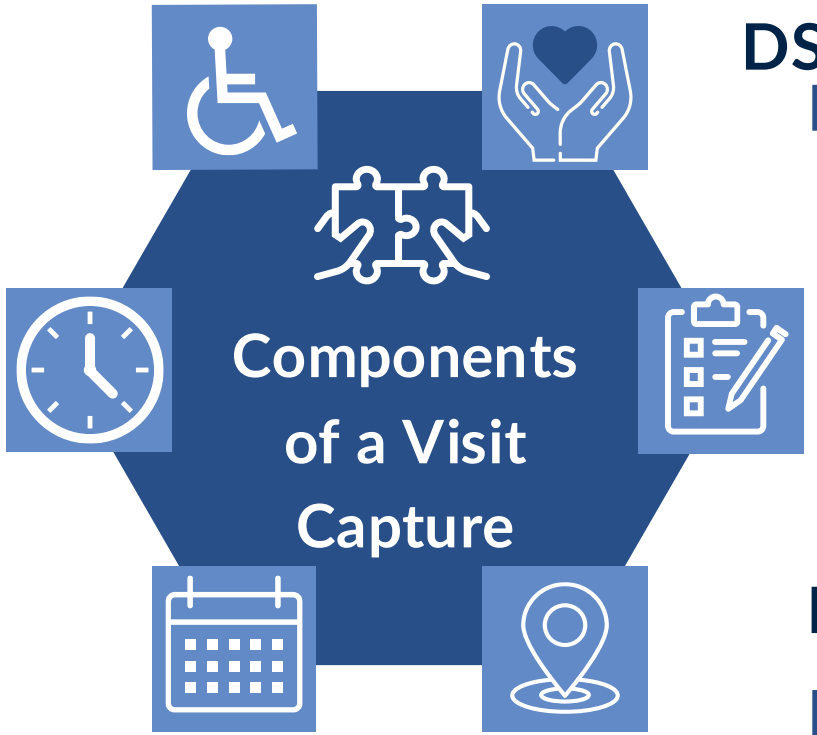
What Happens During the Claims Validation Process?

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

Recipient
Receiving Service

Time
Time service begins and ends

Date
Date of Service



DSP or Independent Provider
Providing Service

Service
Type of Service Performed

Location
Location of the service delivery

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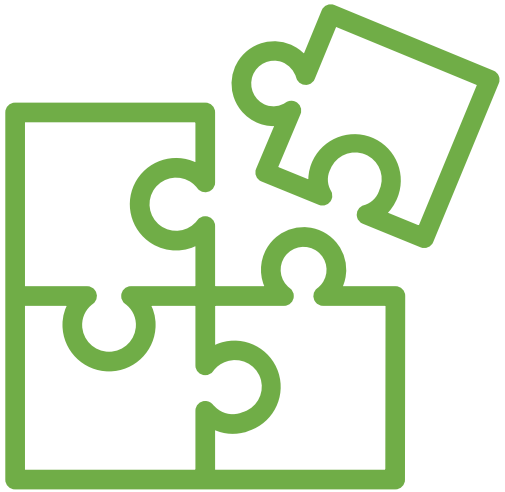
What Happens During the Claims Validation Process?

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.



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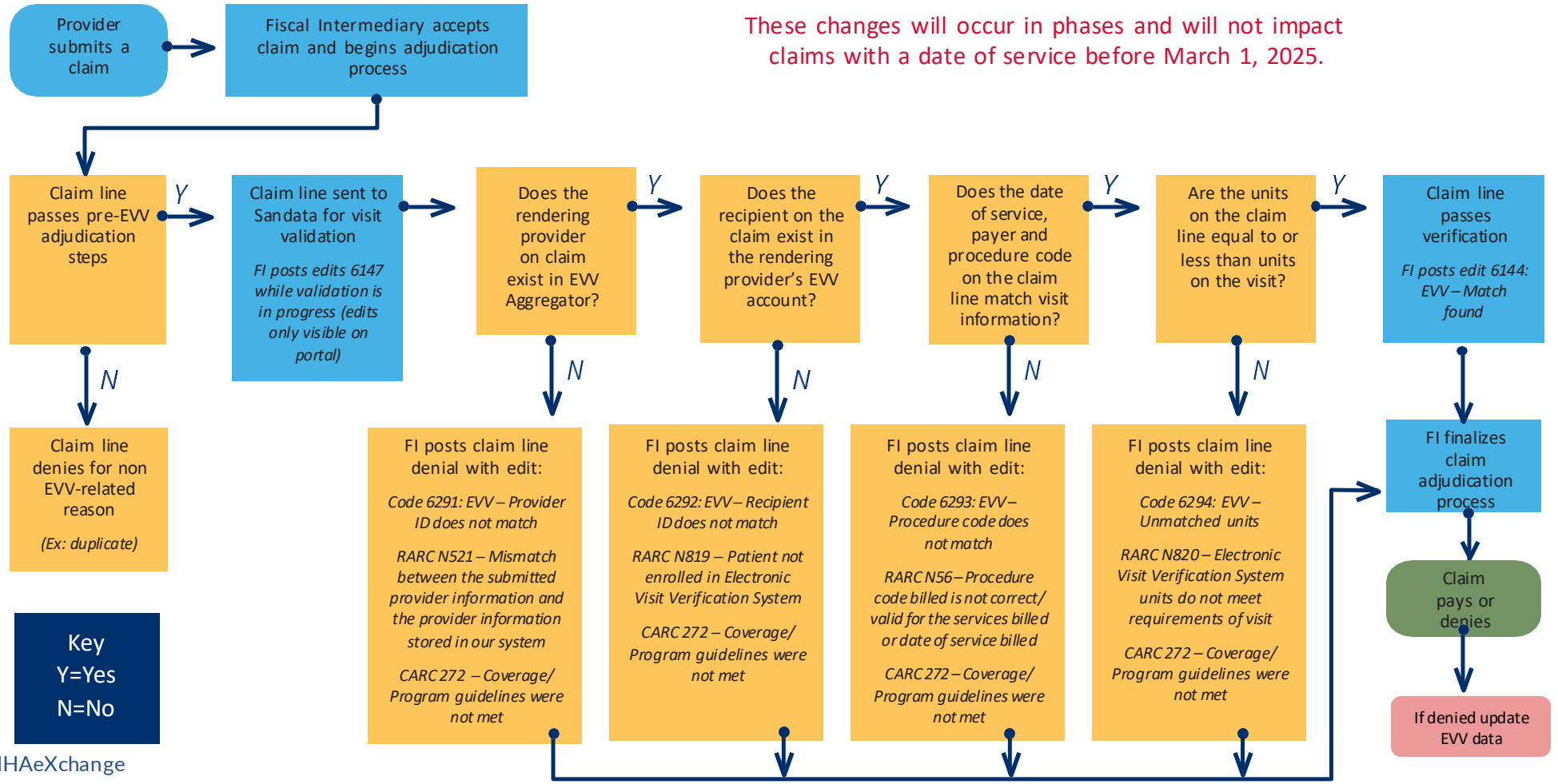
Electronic Visit Verification Claims Validation Process

ELECTRONIC VISIT VERIFICATION CLAIMS VALIDATION PROCESS

These changes will occur in phases and will not impact claims with a date of service before March 1, 2025.



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Ohio Department of Aging (AGE) PASSPORT Waiver Services

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Caregivers (with approved exemption)

For a comprehensive list of all services requiring EVV, please refer to OAC 5160-32-01.

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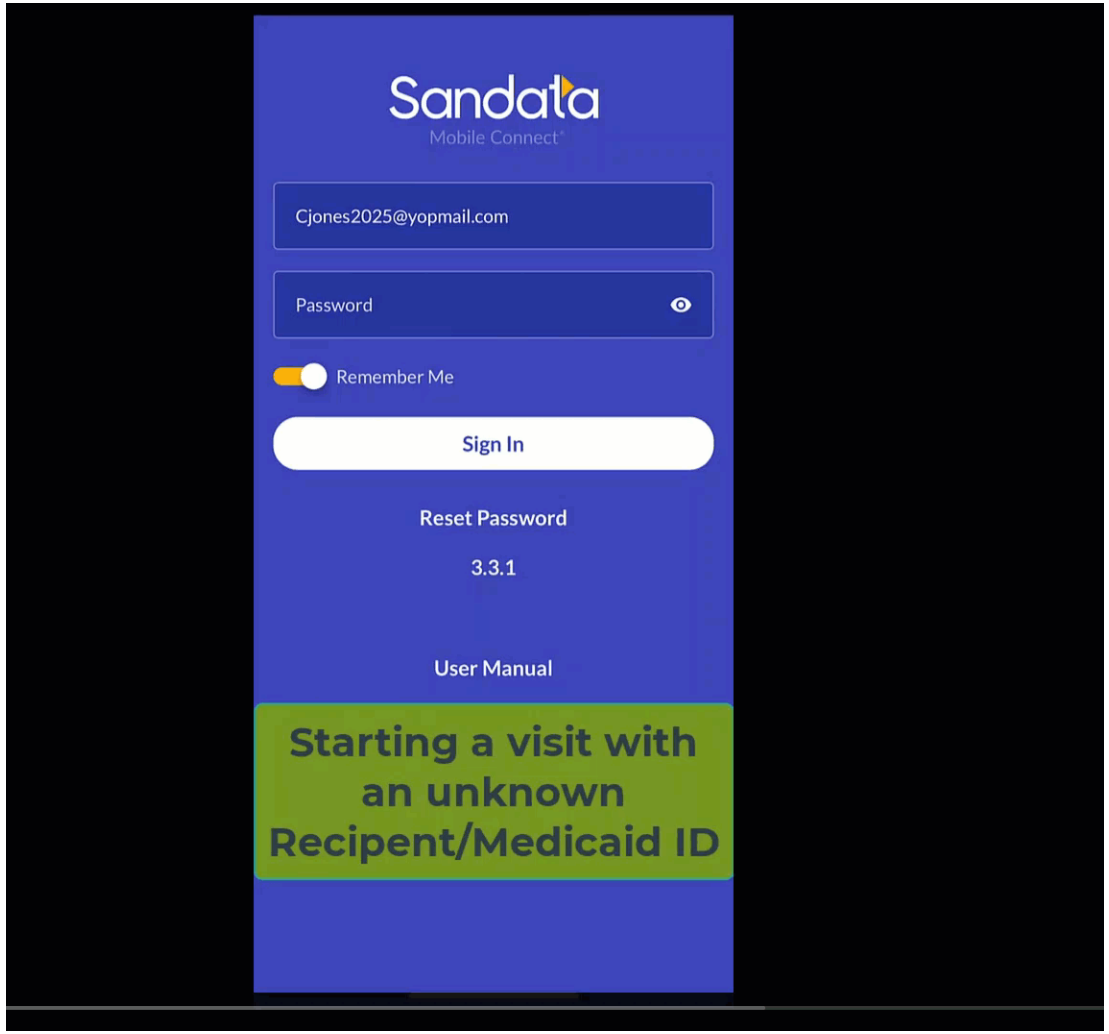
What Happens during the Claims Validation Process?

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



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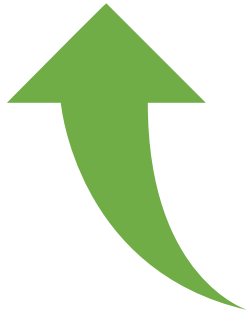
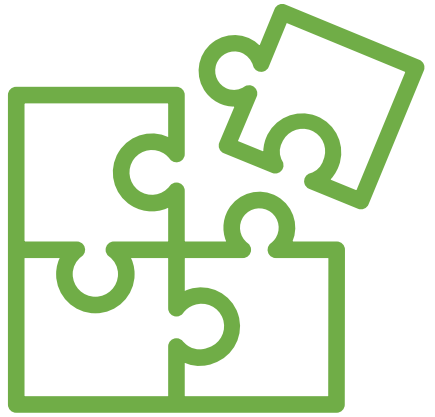
What Happens during the Claims Validation Process?

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.



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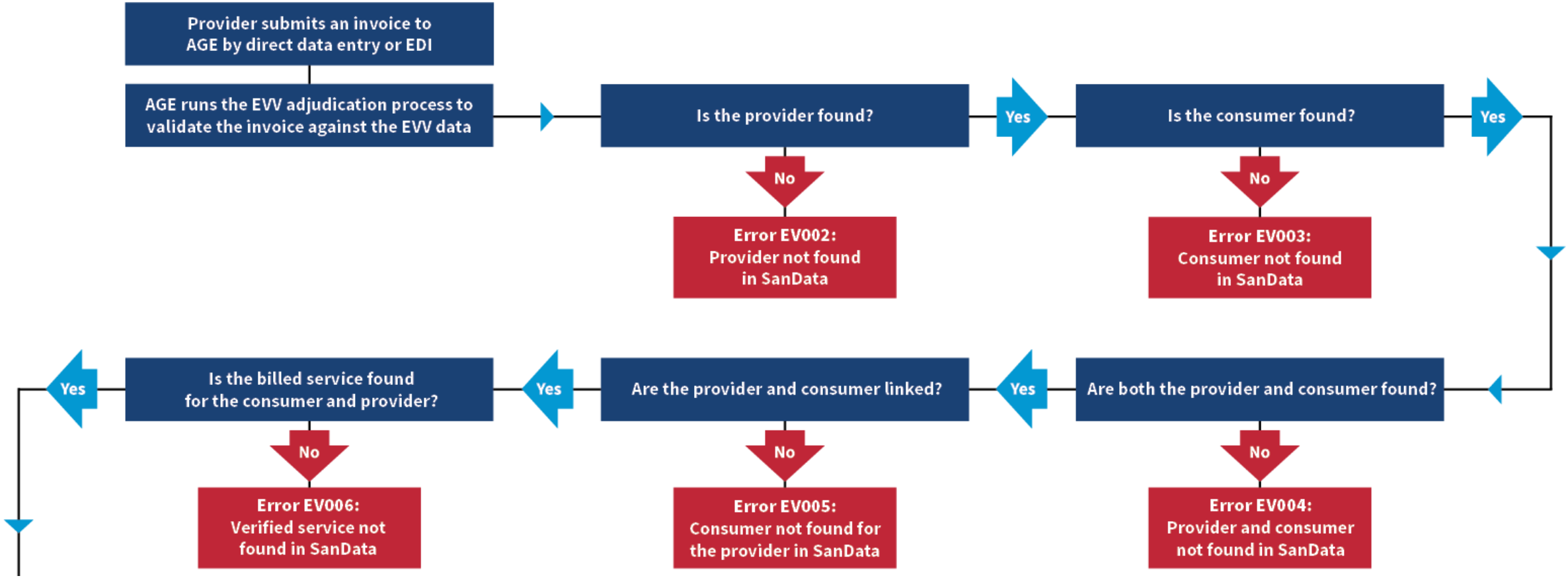
Ohio Department of Aging Electronic Visit Verification Claims Validation Process (1 of 2)



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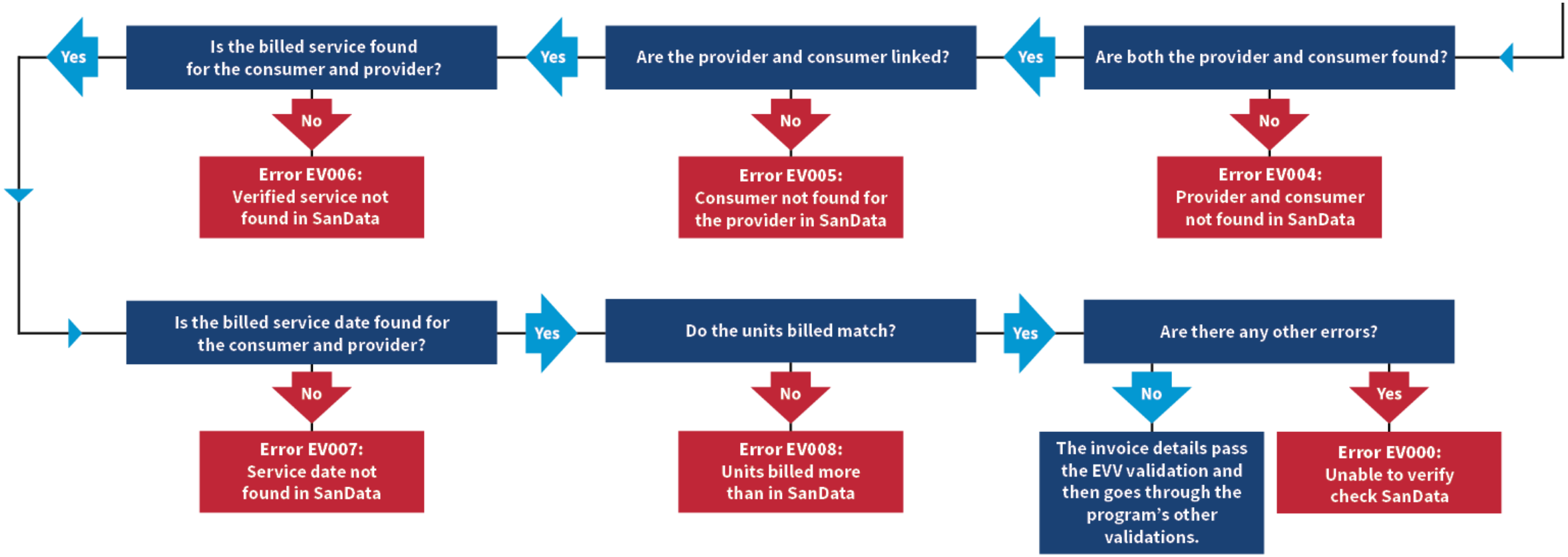
Ohio Department of Aging Electronic Visit Verification Claims Validation Process (2 of 2)



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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.

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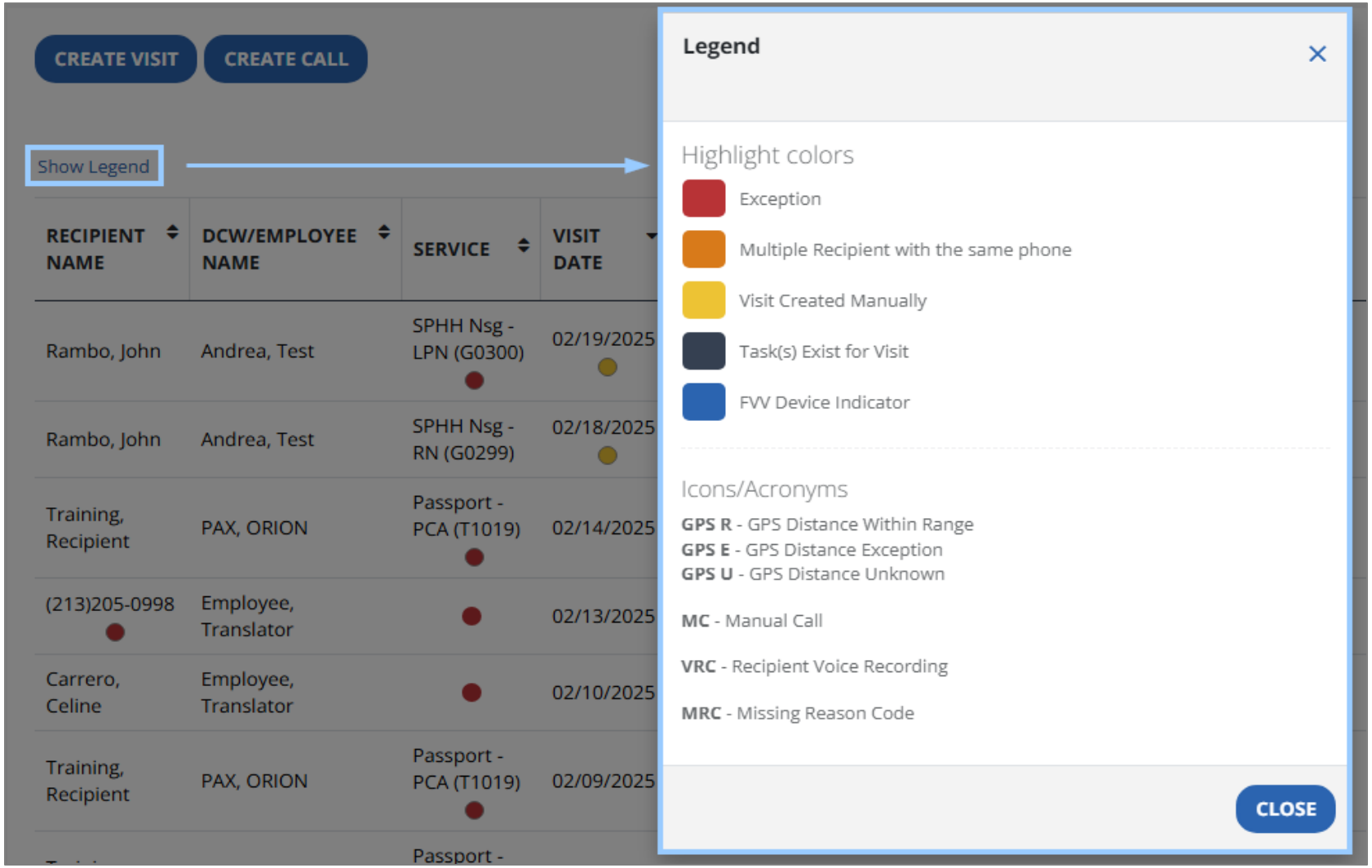
Exception Legend in Visit Maintenance



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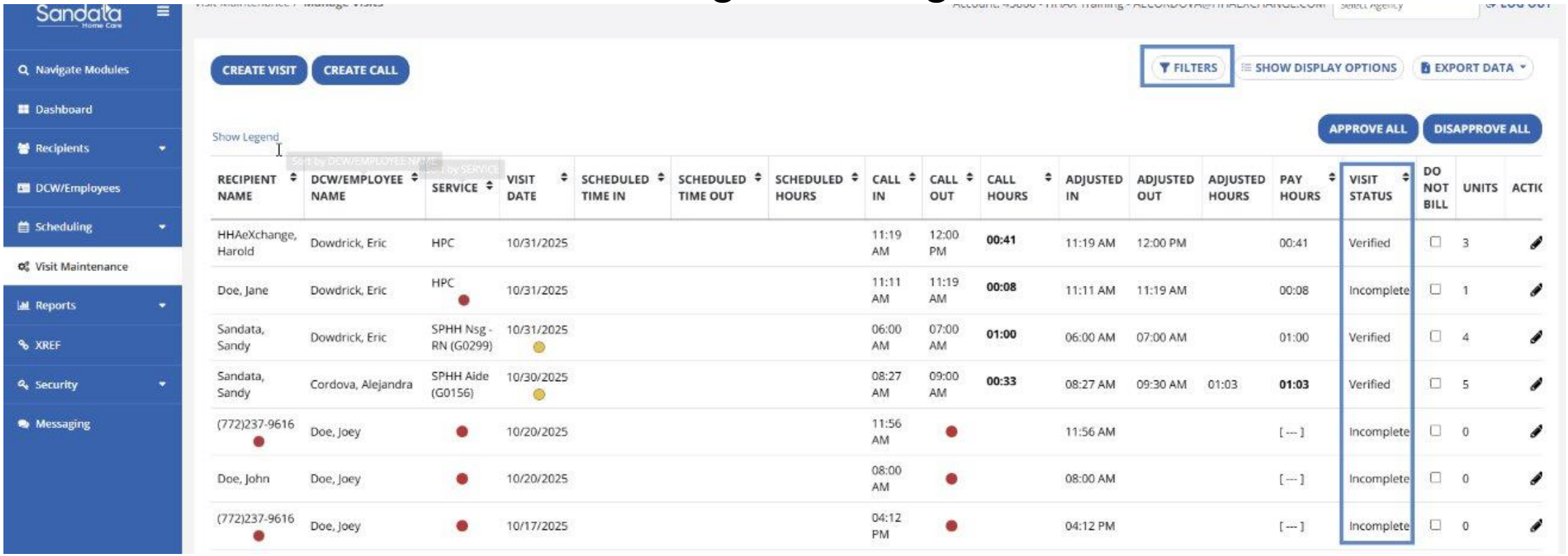
***Note**: This is mock data that is used only for training purposes.*

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.



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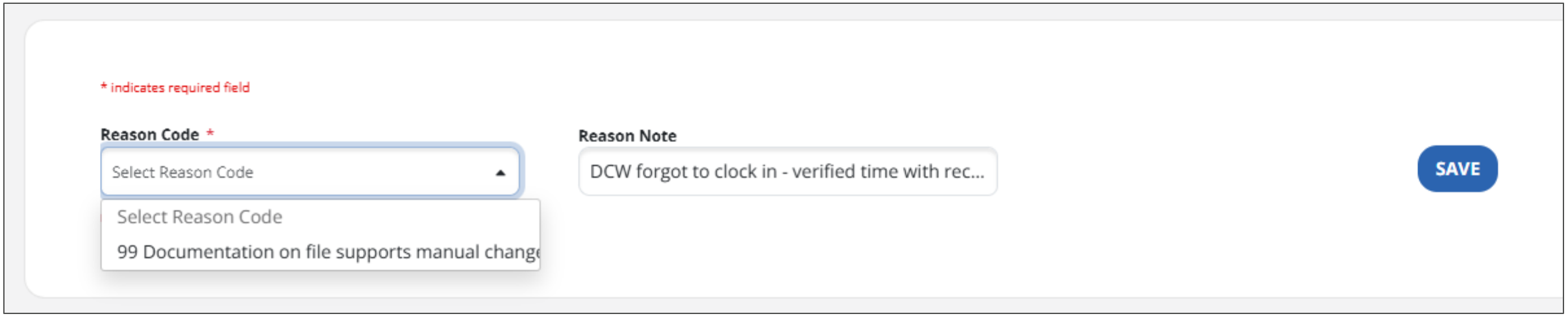
Select Reason Code for an Exception

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



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Visit Maintenance Overview Demo

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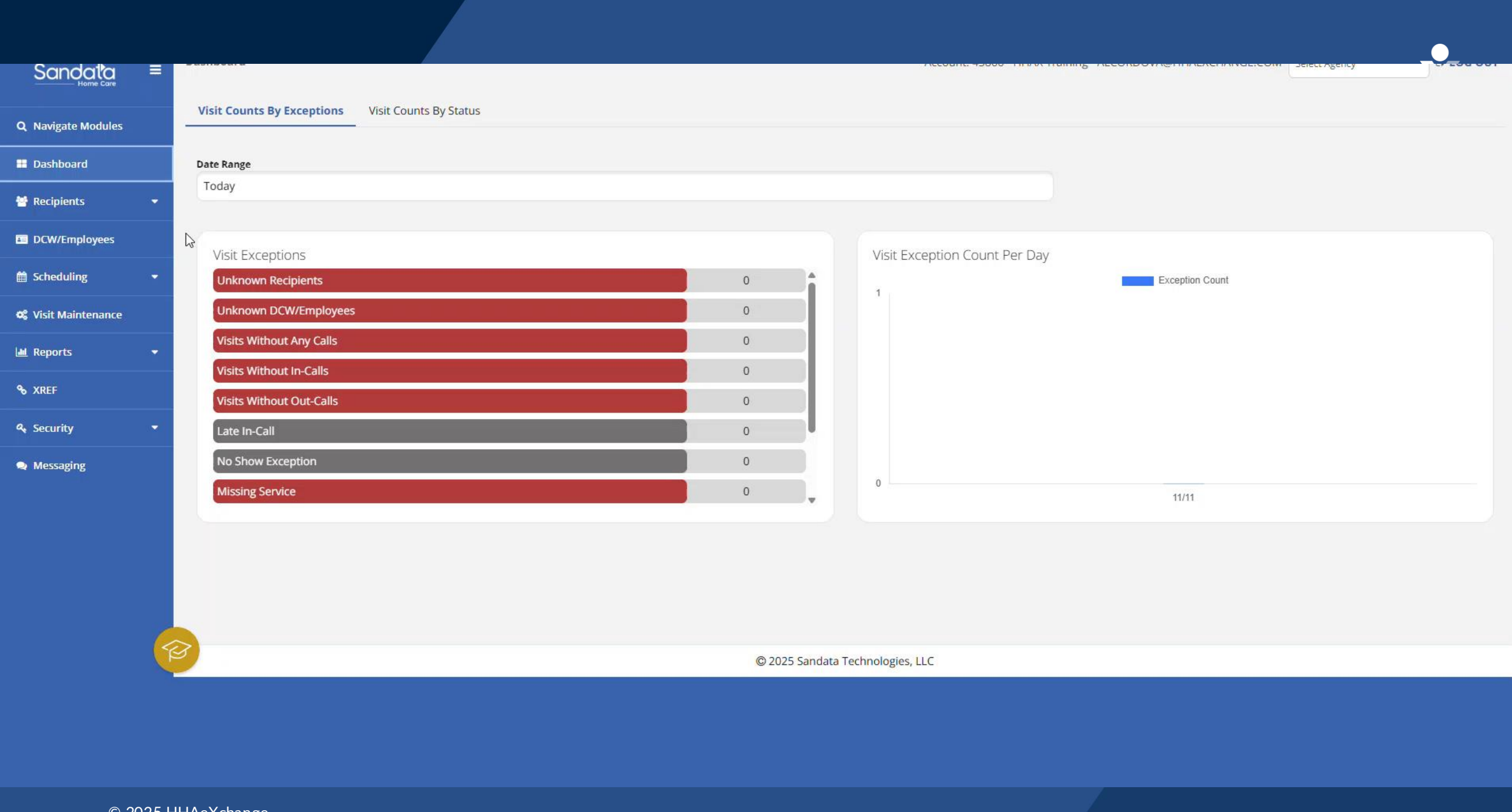

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Knowledge Check – Visit Maintenance Overview

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.

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How to Resolve for Missing Medicaid ID

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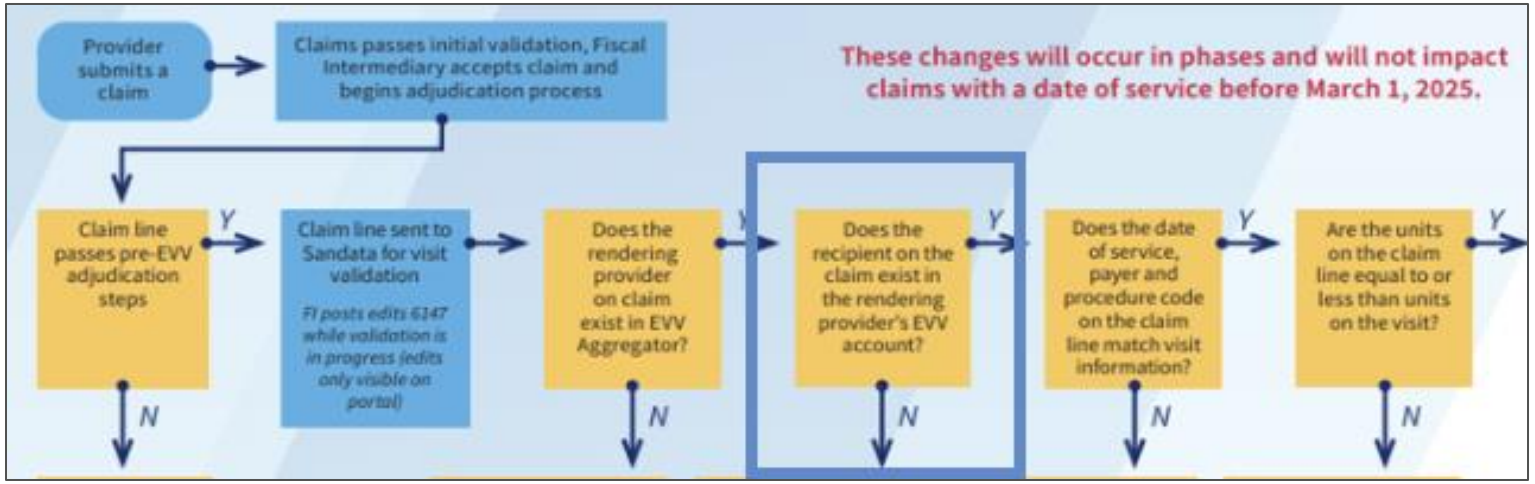
Why is the Medicaid ID important?



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.

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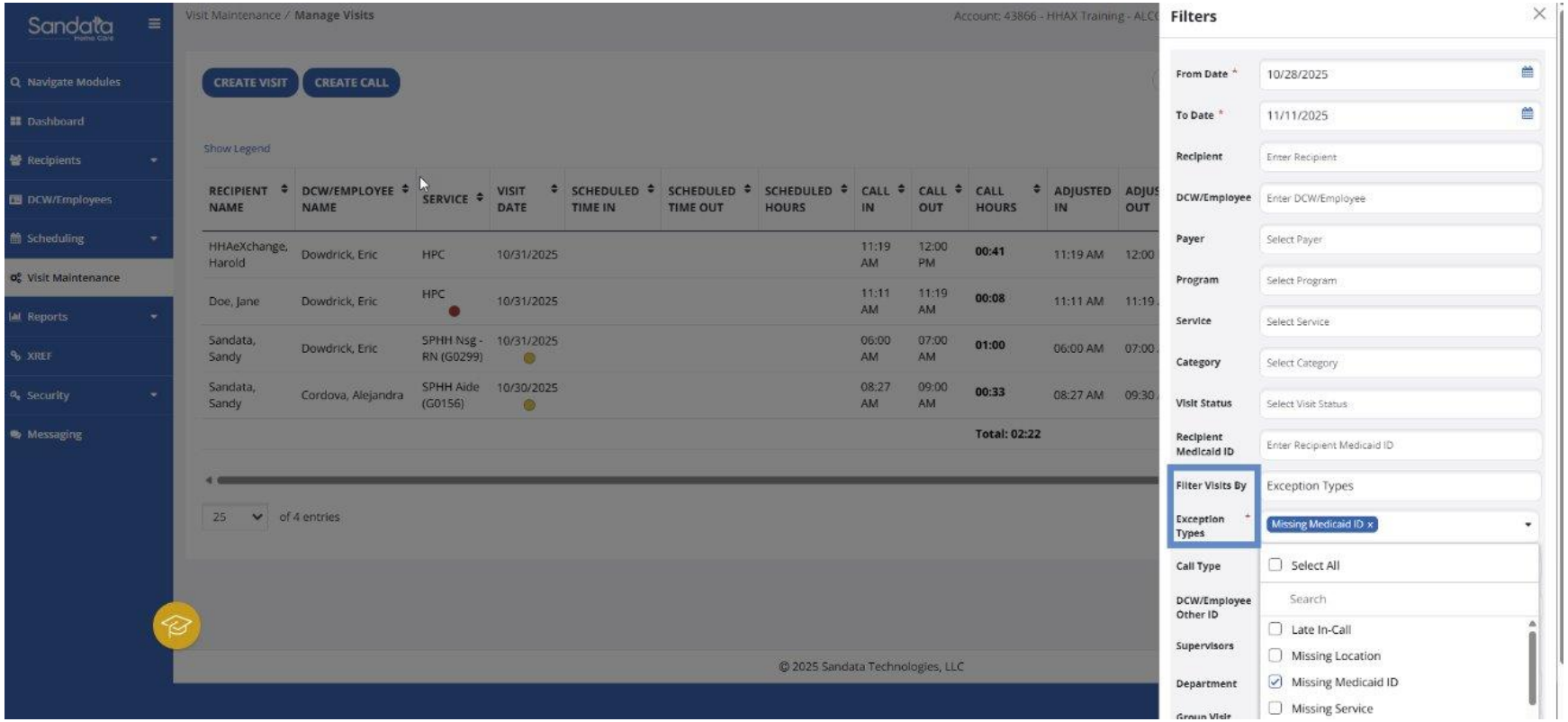
How can I locate visits where the Medicaid ID is missing?

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.



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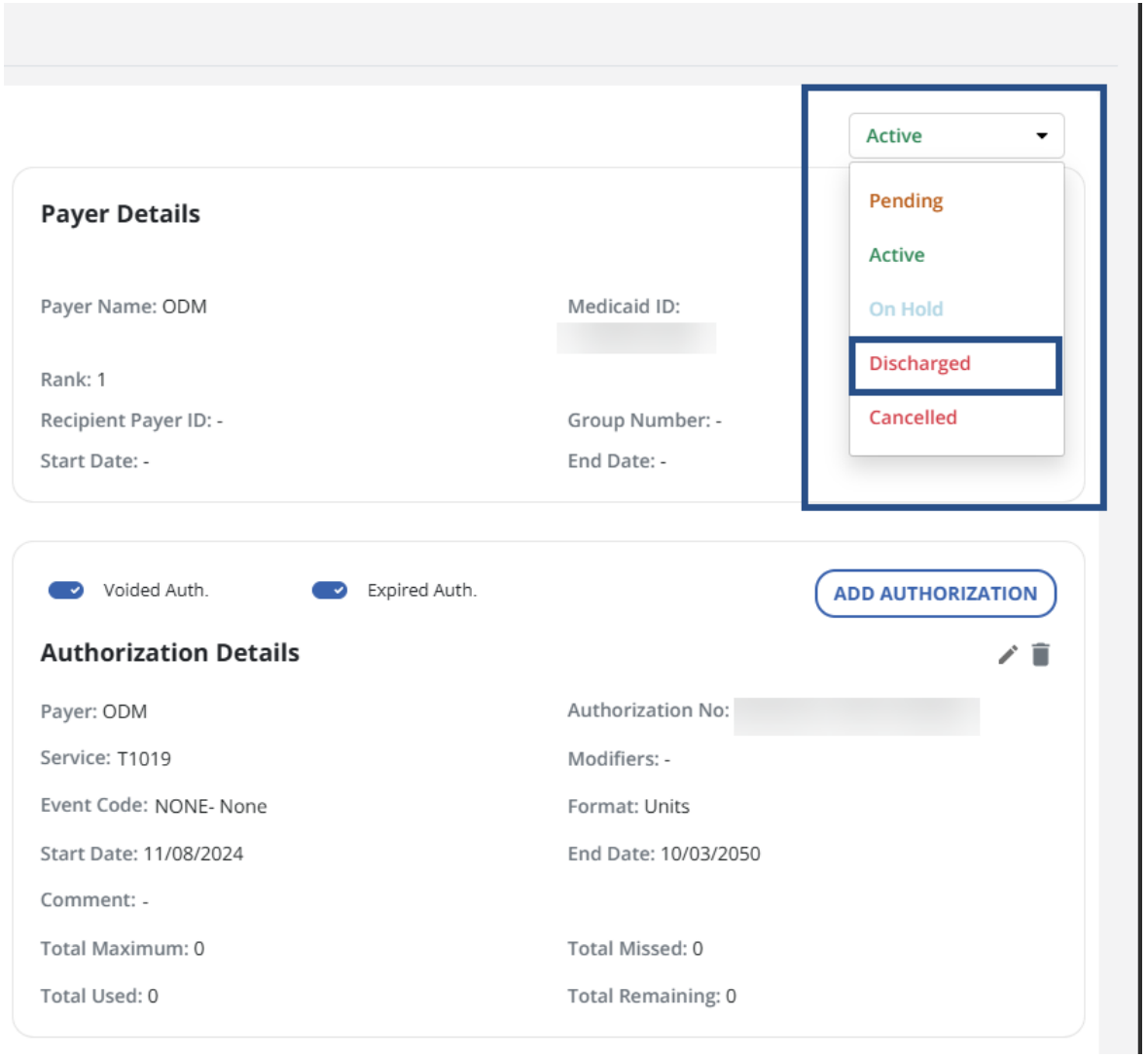
Recipient Medicaid ID

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]

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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 Unknown Recipients	Employee, Translator		02/13/2025				07:37 PM			07:37 PM			Incomplete			

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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.**

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How to Resolve Unknown Recipient Exception Demo

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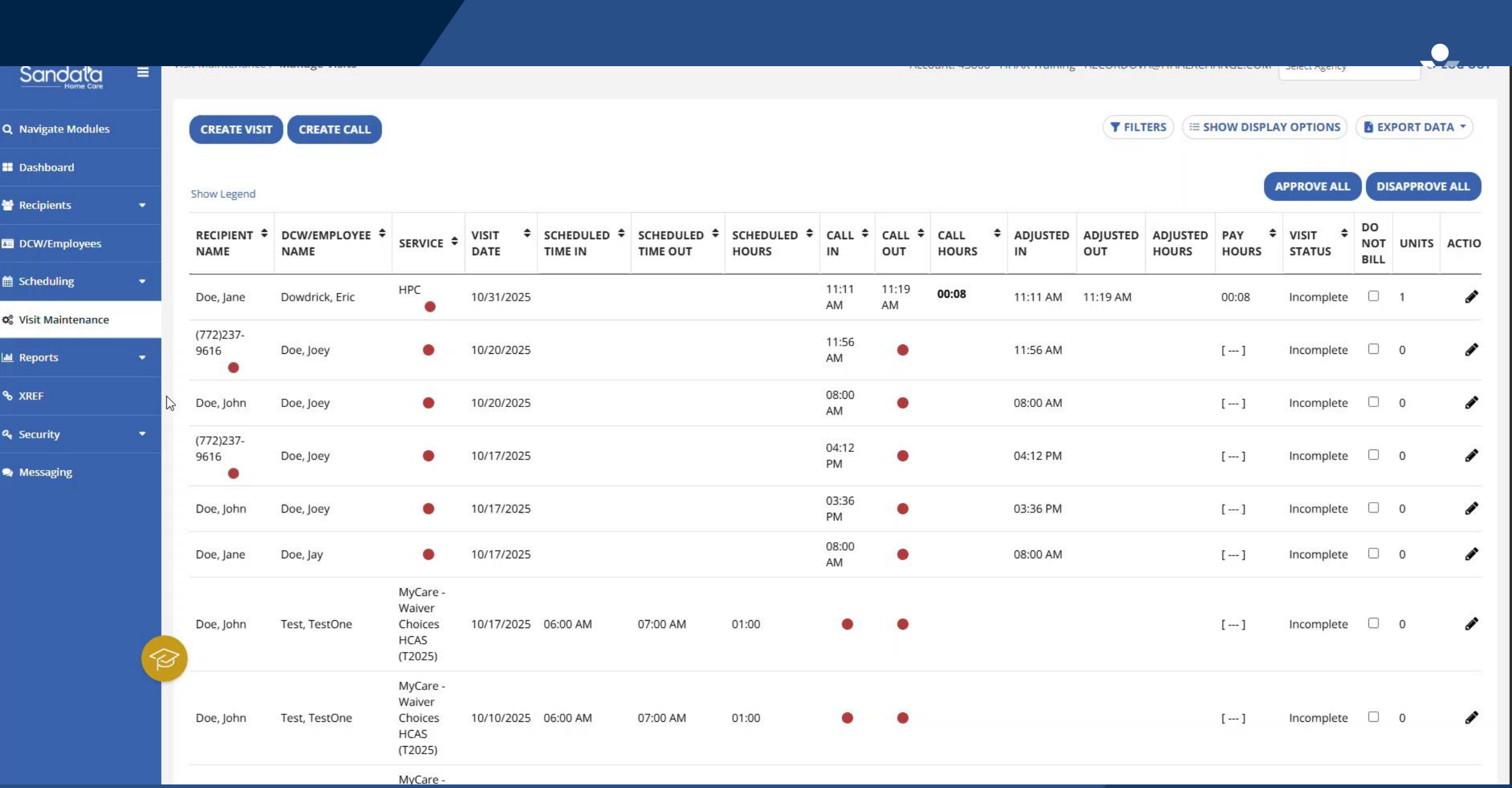

Sandata Home Care

- Navigate Modules
- Dashboard
- Recipients
- DCW/Employees
- Scheduling
- Visit Maintenance
- Reports
- XREF
- Security
- Messaging

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	ACTIO
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	☐	1	
(772)237-9616	Doe, Joey		10/20/2025				11:56 AM			11:56 AM			[---]	Incomplete	☐	0	
Doe, John	Doe, Joey		10/20/2025				08:00 AM			08:00 AM			[---]	Incomplete	☐	0	
(772)237-9616	Doe, Joey		10/17/2025				04:12 PM			04:12 PM			[---]	Incomplete	☐	0	
Doe, John	Doe, Joey		10/17/2025				03:36 PM			03:36 PM			[---]	Incomplete	☐	0	
Doe, Jane	Doe, Jay		10/17/2025				08:00 AM			08:00 AM			[---]	Incomplete	☐	0	
Doe, John	Test, TestOne	MyCare - Waiver Choices HCAS (T2025)	10/17/2025	06:00 AM	07:00 AM	01:00							[---]	Incomplete	☐	0	
Doe, John	Test, TestOne	MyCare - Waiver Choices HCAS (T2025)	10/10/2025	06:00 AM	07:00 AM	01:00							[---]	Incomplete	☐	0	
		MyCare -															

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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

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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.**

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How to Resolve Missing Call In/Out Demo

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Sandata Home Care

- Navigate Modules
- Dashboard
- Recipients
- DCW/Employees
- Scheduling
- Visit Maintenance
- Reports
- XREF
- Security
- Messaging

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	ACTIO
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	☐	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	☐	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	☐	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	☐	5	
Doe, Jane	Doe, Joey		10/20/2025				11:56 AM			11:56 AM			[---]	Incomplete	☐	0	
Doe, John	Doe, Joey	MyCare - PCA (T1019)	10/20/2025				08:00 AM			08:00 AM			[---]	Incomplete	☐	0	
(772)237-9616	Doe, Joey		10/17/2025				04:12 PM			04:12 PM			[---]	Incomplete	☐	0	
Doe, John	Doe, Joey		10/17/2025				03:36 PM			03:36 PM			[---]	Incomplete	☐	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	☐	2	
							08:00										

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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	☐	

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

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.**

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How to Resolve Unauthorized Service Exception Demo

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Sandata EVV | Manage Visits

evv-ui.sandata.com/visit-maintenance

New Chrome available

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

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	AI H
HHAeXchange, Harold	Dowdrick, Eric	HPC	10/31/2025				11:19 AM	12:00 PM	**00:41**	11:19 AM	12:00 PM	
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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

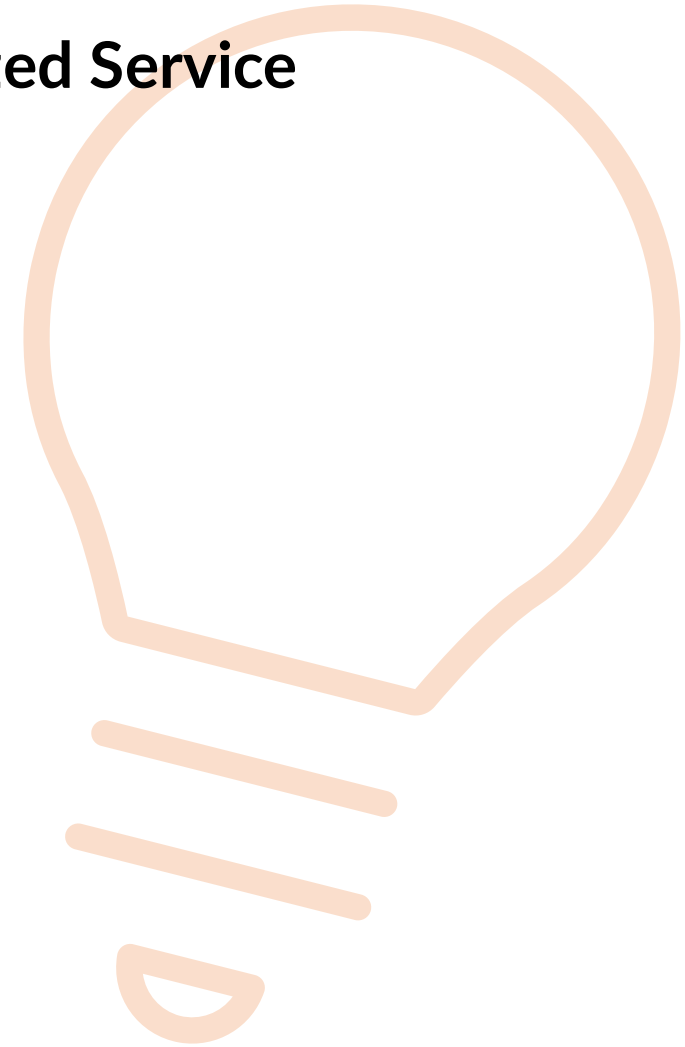
« < 1 > »

https://evv-ui.sandata.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.



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Creating a Manual Visit

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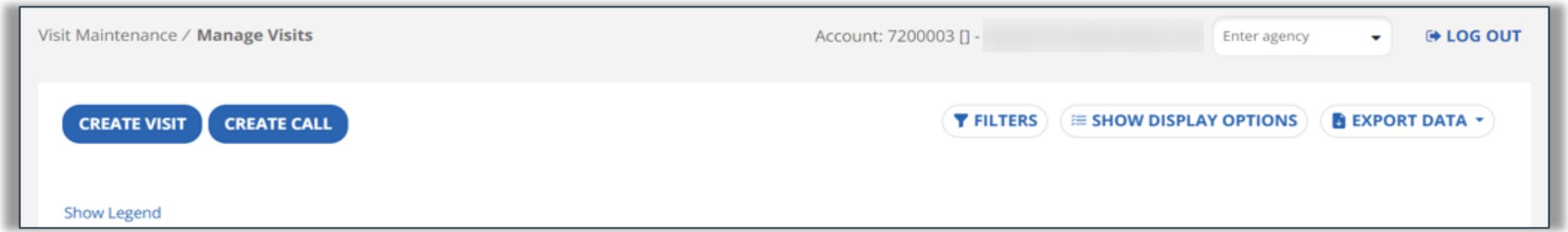
What if I Need to Create a Visit?

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.



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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**.

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Creating a Manual Visit Demo

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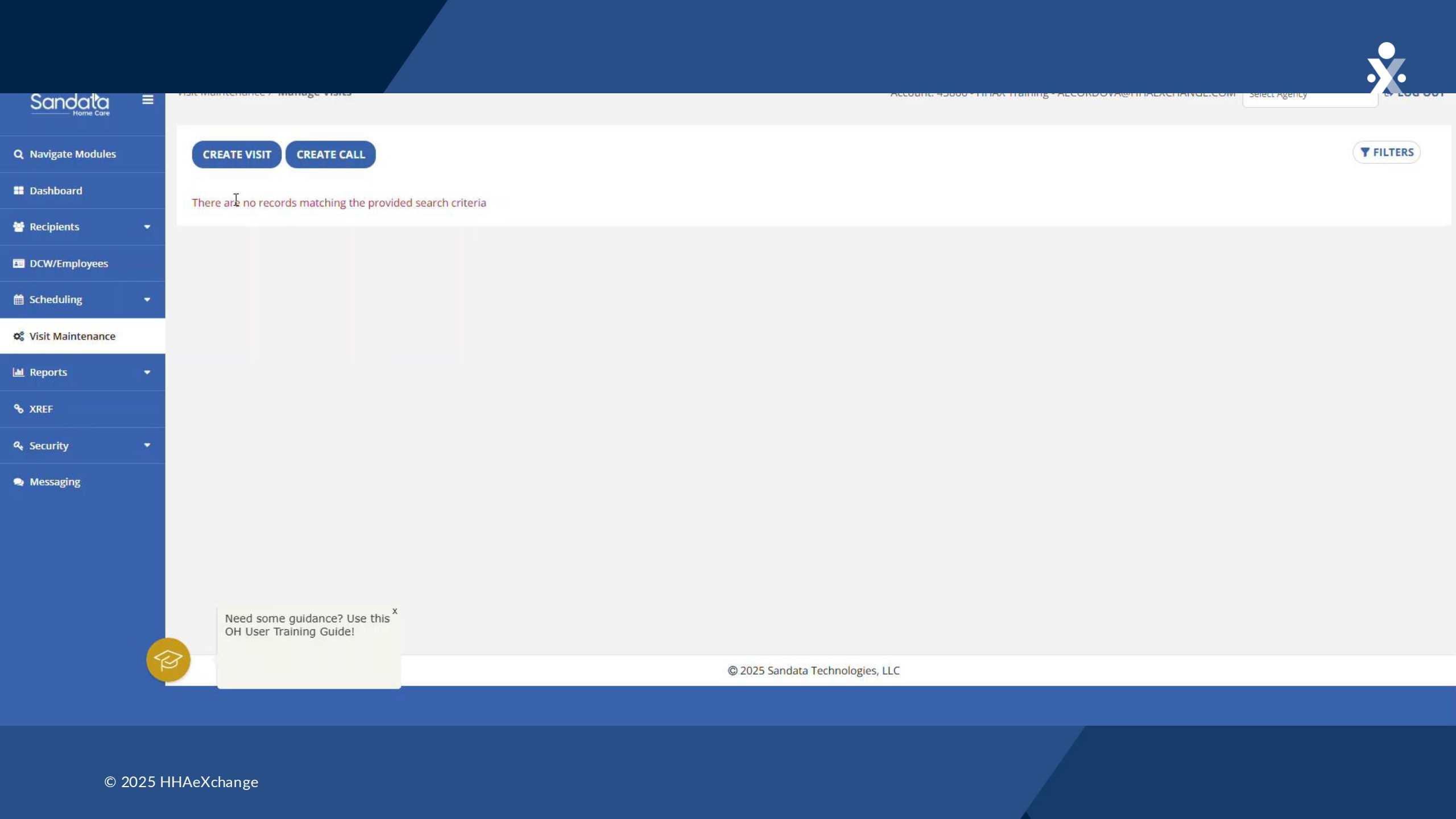

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Knowledge Check – Creating a Manual Visit

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.

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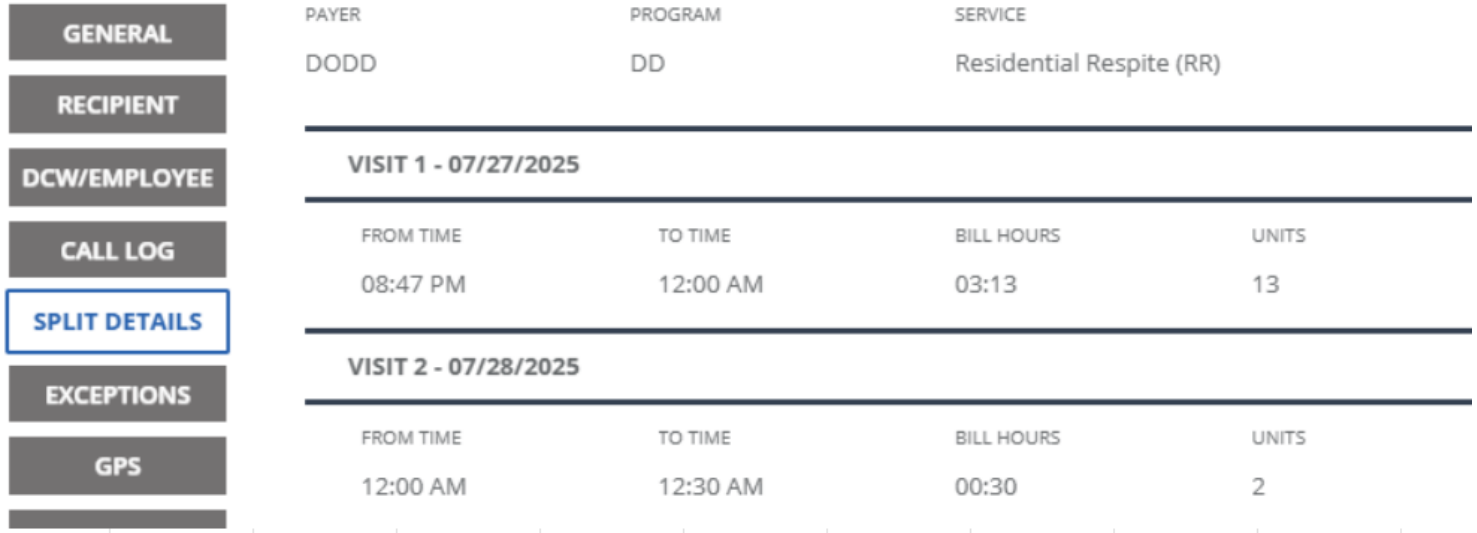
Reminder: Overnight Visits

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)



Unit Conversion Table

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Key Takeaways

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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.

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Resources

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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

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EVV Support

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

- Ohio Department of Medicaid Website
- Electronic Visit Verification

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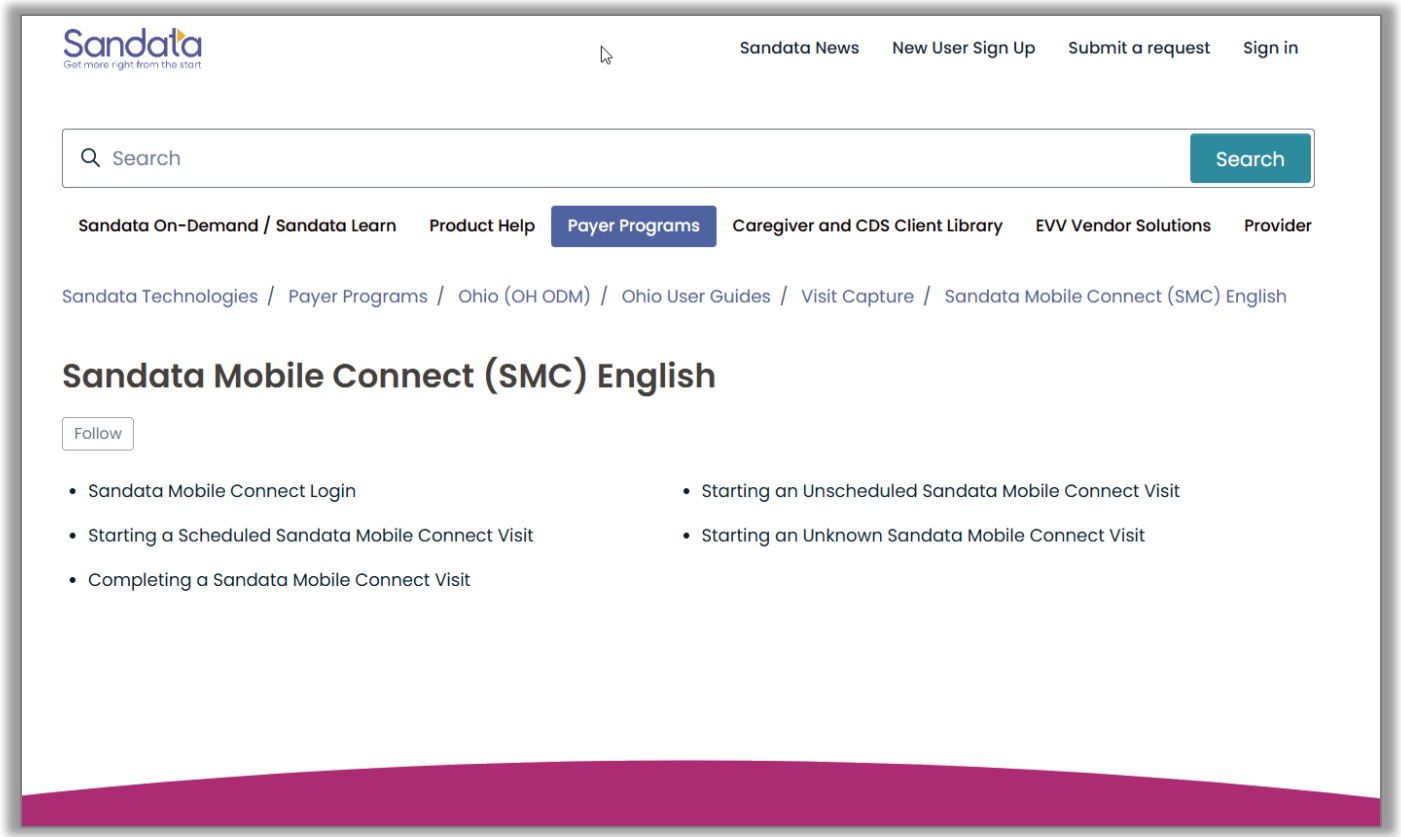
DCW/Employee Training Resource

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



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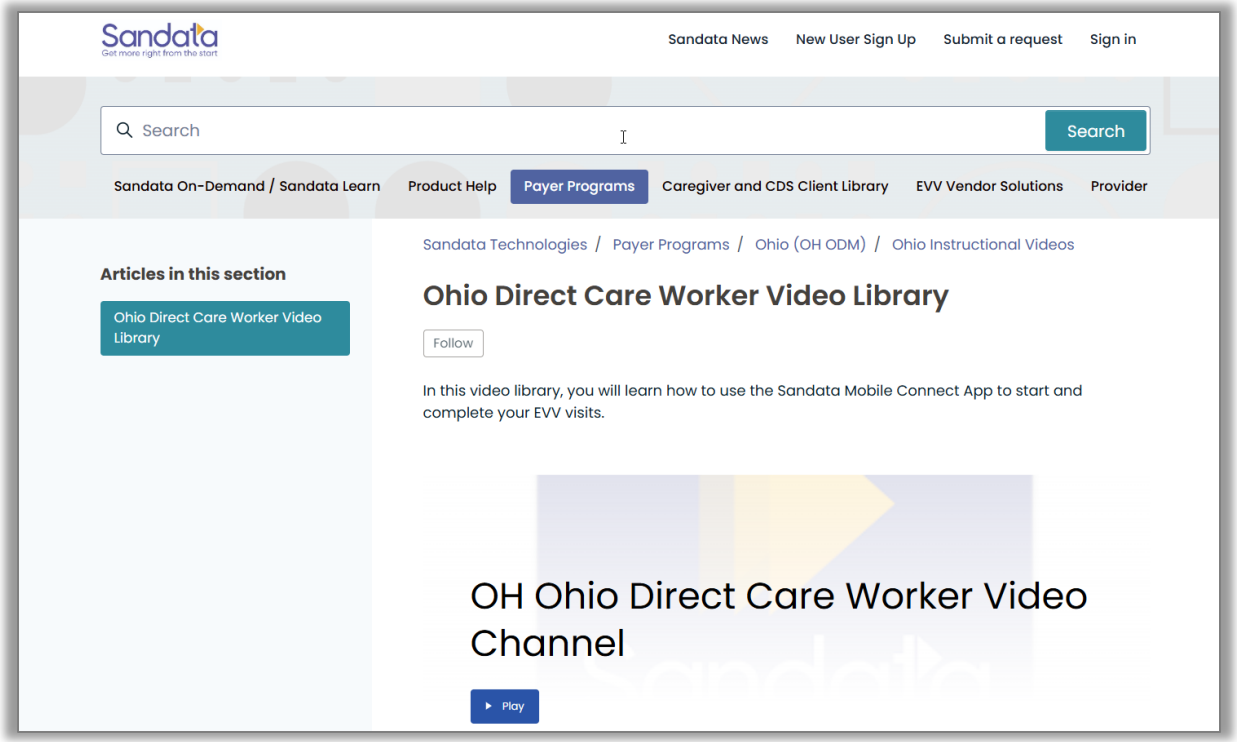
DCW/Employee Video Library

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



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Questions?

Register for Upcoming Trainings

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THANKS FOR ATTENDING!

Please provide us your feedback after exiting the webinar.