

Our Webinar Will Begin Shortly

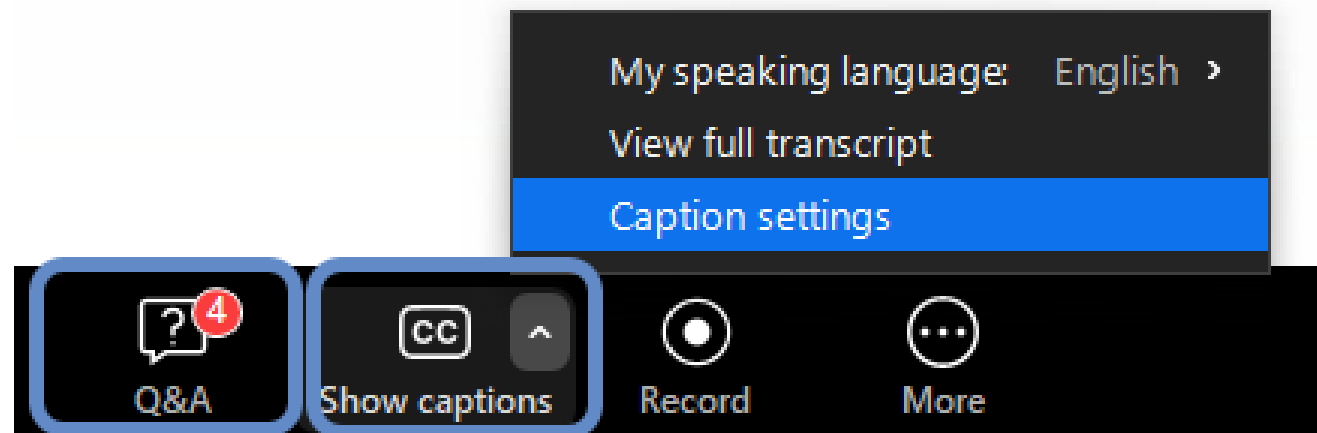
The content contained herein ("Confidential Information") are the confidential property of HHAeXchange and may not be copied or distributed outside the HHAeXchange organization without the express written consent of HHAeXchange. Distribution of this document or disclosure of any Confidential Information set forth herein to any party other than the intended recipient(s) of this presentation is expressly prohibited.



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). Below this menu, at the bottom of the screen, is a row of four buttons. The first button, labeled "Q&A", has a speech bubble icon with a red circle containing the number "4" and is highlighted with a blue border. The second button, labeled "Show captions", has a "CC" icon and an upward-pointing arrow icon and is also highlighted with a blue border. The third button is labeled "Record" and has a circular icon with a dot in the center. The fourth button is labeled "More" and has a three-dot menu icon.



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!**

Mastering Data Entry

January 2026

The content contained herein ("Confidential Information") are the confidential property of HHAeXchange and may not be copied or distributed outside the HHAeXchange organization without the express written consent of HHAeXchange. Distribution of this document or disclosure of any Confidential Information set forth herein to any party other than the intended recipient(s) of this presentation is expressly prohibited.





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

Who should take this training?

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

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

Sandata Standard System Terminology

Corresponding Terminology

CONTRACT / PAYER

- 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 (DCW)
- 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



Objectives of Today's Training

You will be able to:

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



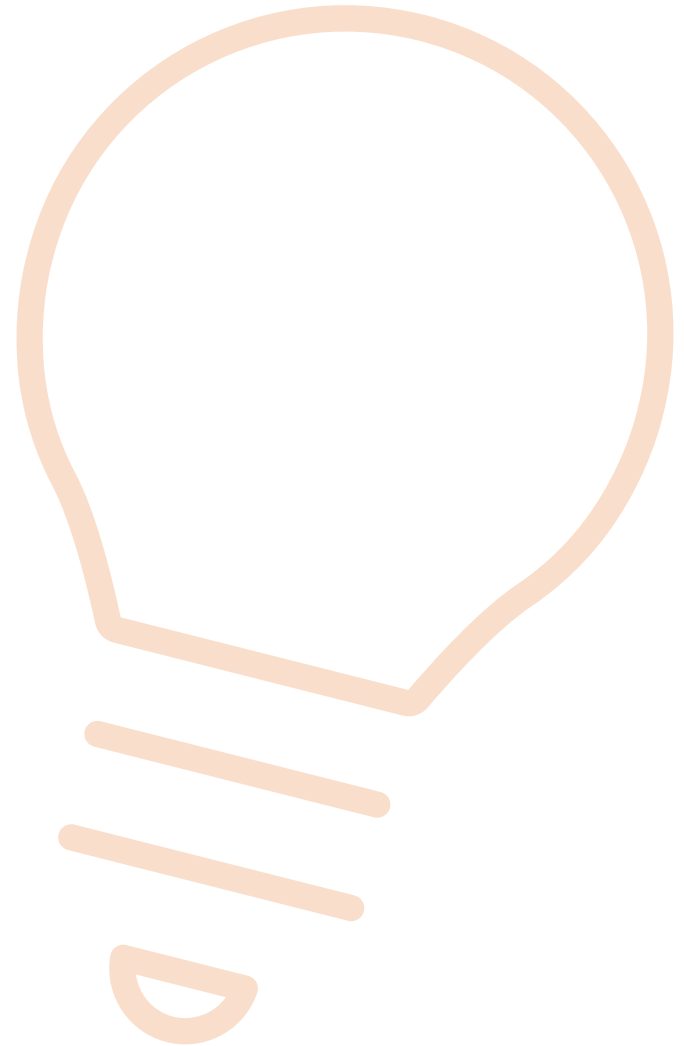
Knowledge Checks

You'll see these throughout the presentation!



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

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













Agenda

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

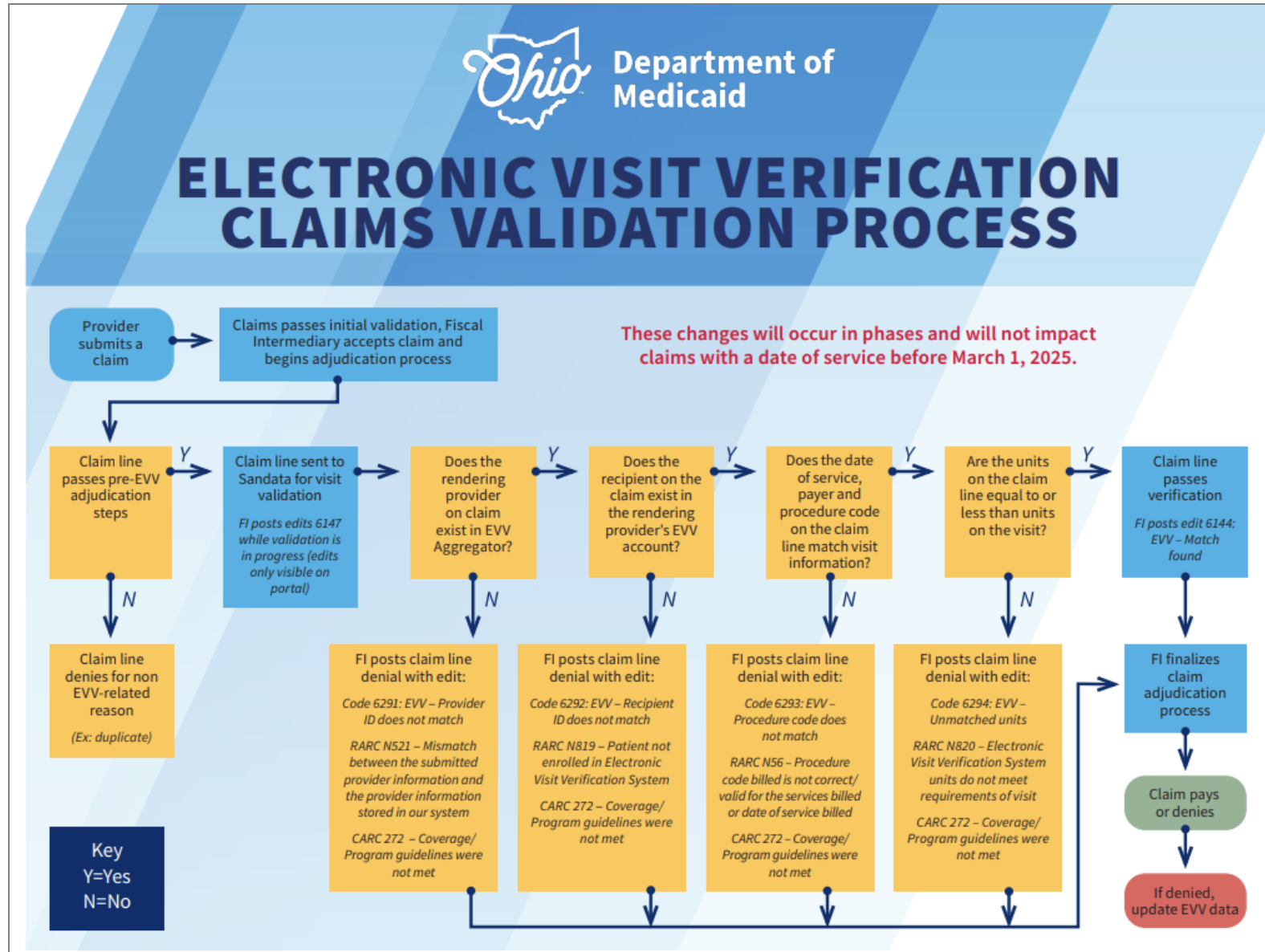


EVV Claims Adjudication Phases



		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.						

Electronic Visit Verification Claims Validation Process



List of Services MyCare Ohio Plans



- G0151
- G0152
- G0153
- G0156
- G0299
- G0300
- T1000
- T1001
- T1001_U9
- S5125
- T1002
- T1003
- T1019
- T2025
- ECL

[ODM EVV Covered Programs and Services.pdf](#)

EVV Overview

The content contained herein ("Confidential Information") are the confidential property of HHAeXchange and may not be copied or distributed outside the HHAeXchange organization without the express written consent of HHAeXchange. Distribution of this document or disclosure of any Confidential Information set forth herein to any party other than the intended recipient(s) of this presentation is expressly prohibited.



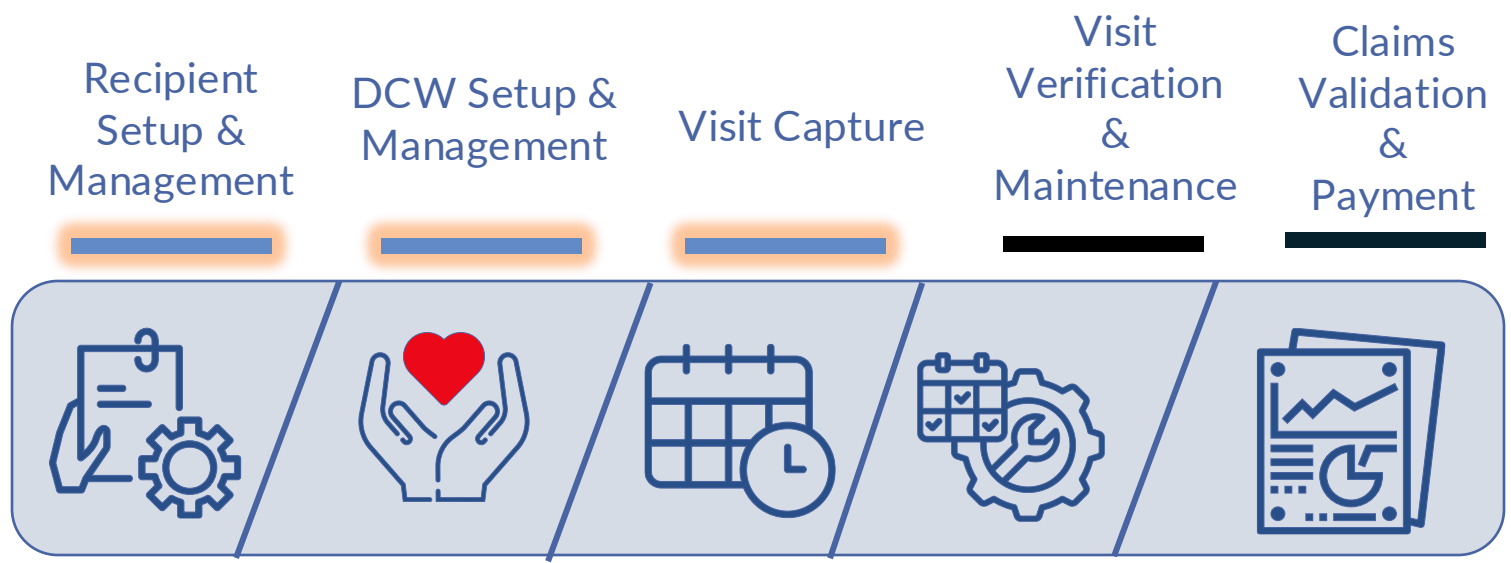
Electronic Visit Verification Overview



Under the 21st Century Cures Act, providers must use Electronic Visit Verification (EVV) for Medicaid-paid personal care and home health services.

DCW need to record their visits electronically to confirm services are done correctly.

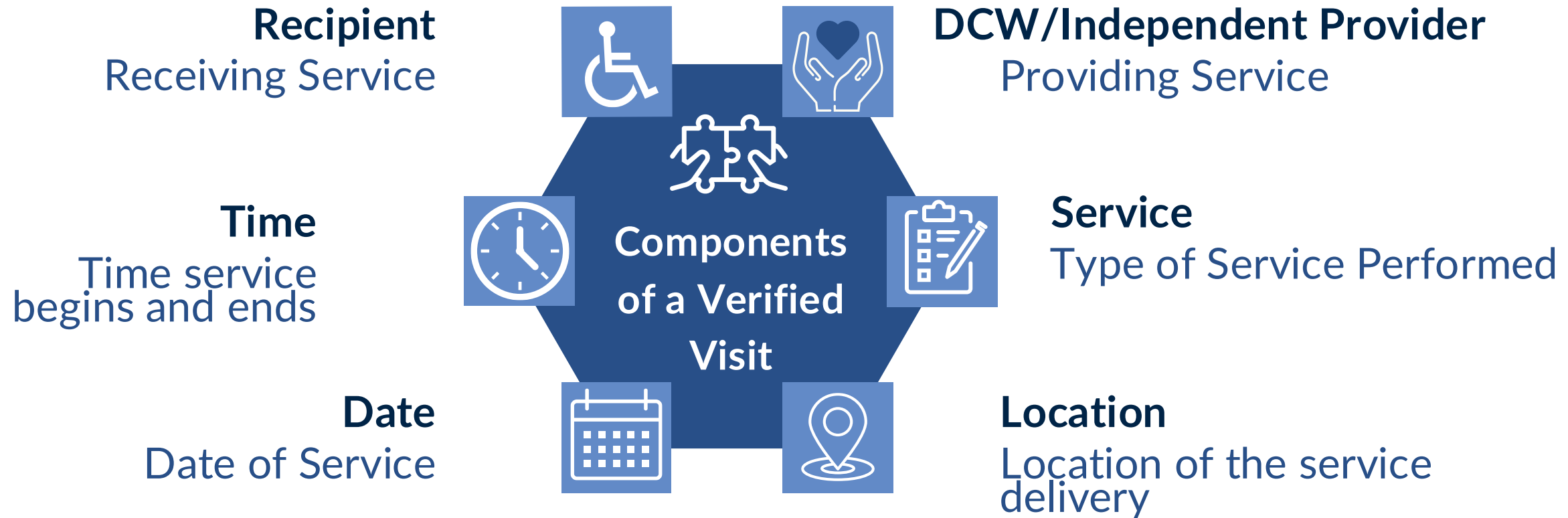
The first part of this training will help you enter data for your Recipient and DCW accurately. This ensures visits are tracked, improves accountability, reduces errors, and helps your agency follow the rules.



> Visit Capture



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

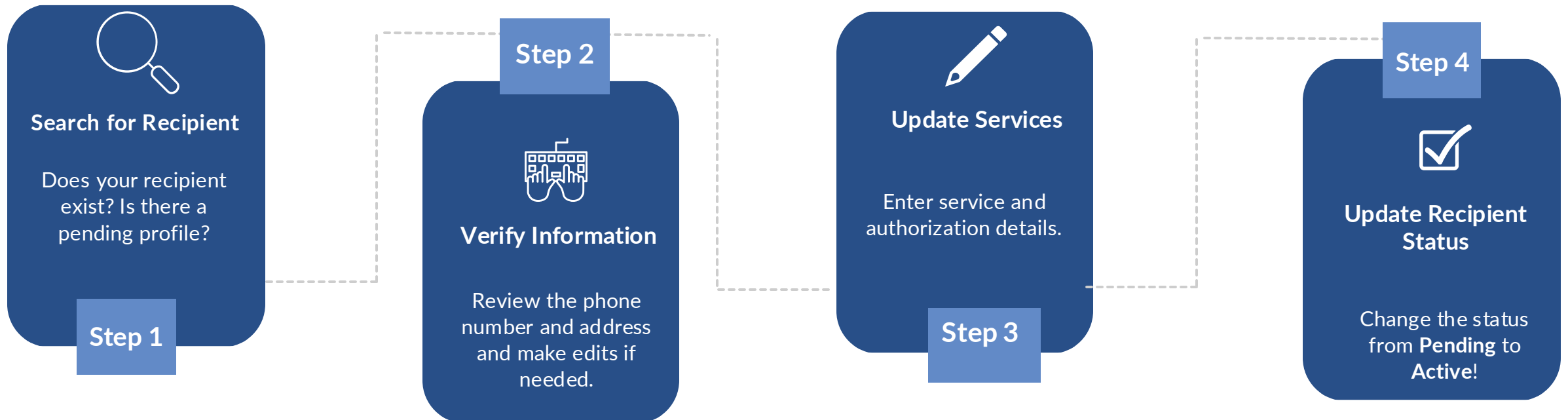




Setting up Recipient Profiles



Steps to Setting up a Recipient



Step 1: Verify Information

Does the recipient appear in list view? If NO:

1. Navigate to **Recipient > Recipient Management**
2. Select **Create Recipient**.
3. Toggle **ODA Only/No Medicaid ID** if no Medicaid ID available.
4. Fill in required fields, which include **Date of Birth (DOB), Program, Payer, and Client Payer ID** (pims number or insurance number)
5. Select **Create Recipient**.



New Recipient


*Required

ODA Only / No Medicaid ID ☒

Newborn ☐

Last Name*

First Name*

Date Of Birth* 

Program*

Payer*

Medicaid ID

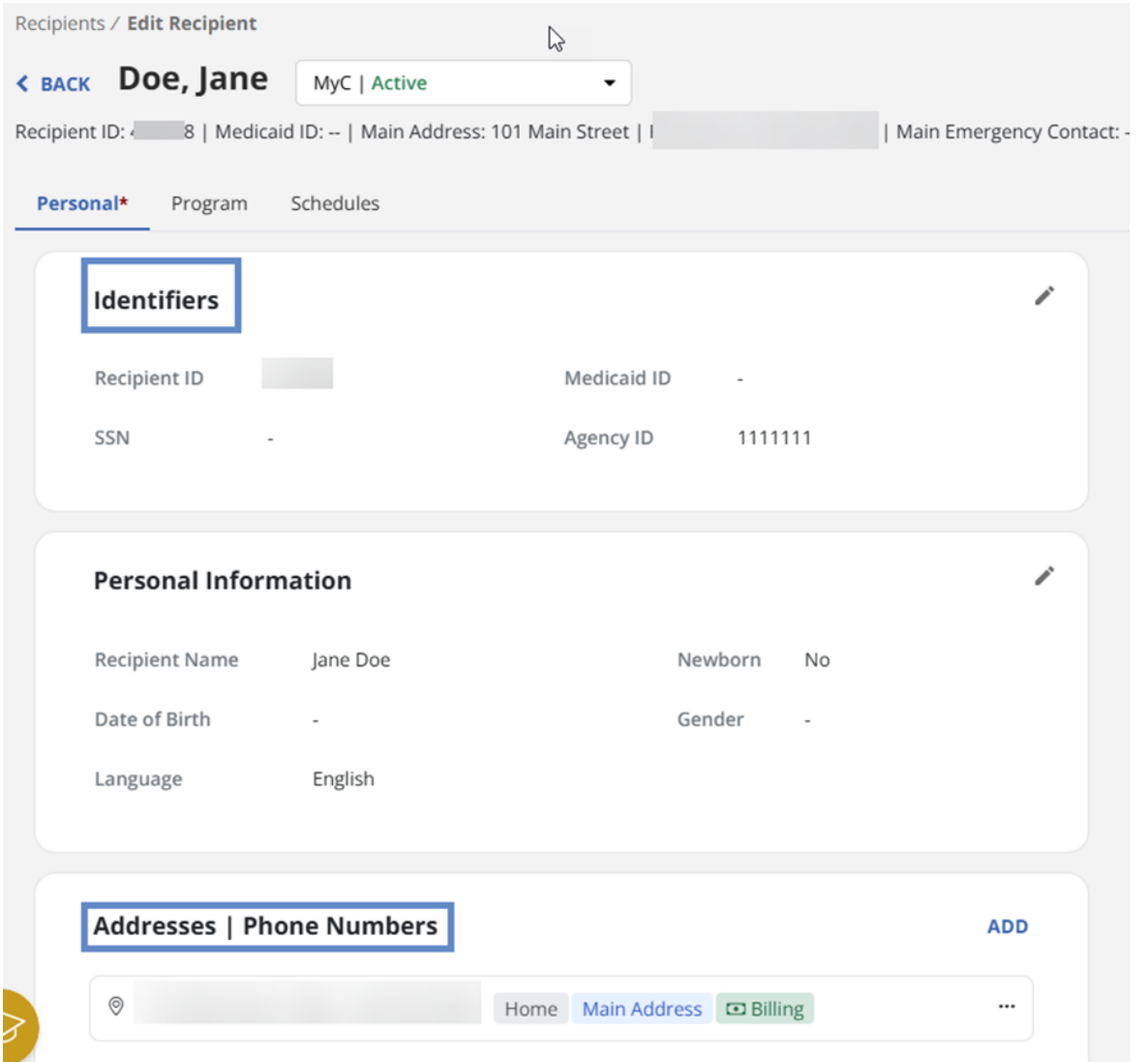
Client Payer ID*

SSN

Phone

Step 2: Verify Information

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



Recipients / Edit Recipient

< BACK Doe, Jane MyC | Active

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

Personal* Program Schedules

Identifiers

Recipient ID	8	Medicaid ID	-
SSN	-	Agency ID	1111111

Personal Information

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

Addresses | Phone Numbers ADD

Home Main Address Billing

Step 3: Update Services

1. Navigate to **Program** tab.
2. Add Services for recipient; fill out required fields, **including Service, Start and End Date.**
3. Add EVV Authorizations for recipient; fill out required fields, including **Payer, Service, Event Code, Format, and Start and End Date.**
4. If a **Payer** is changing, ensure you add the Payer with a new authorization.

Note: End date the existing authorization and use the add authorization button to create a new authorization for the new Payer.

[Creating Recipient Authorizations](#)

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

© 2026 HHAAExchange



Service Details

* Required

Service

Service*

Select Service

Start Date *

01/11/2022

End Date

Enter End Date

CANCEL

SAVE AND ADD ANOTHER

SAVE

Authorization Details

* Required

General Info

Payer*

DODD

Authorization Number

AMP20250224XXXXXXXX

Service*

Select Service

Modifiers:

1:

2:

3:

4:

Event Code*

Select Event Code

Format*

Select Format

☐ Voided

Date Range

Start Date*

02/24/2025

End Date*

Set End Date



Step 4: Update Status



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

Payer Details

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

Dropdown menu options: Pending, Active, On Hold, Discharged, Cancelled



Visit Counts By Exceptions

Visit Counts By Status

Q Navigate Modules

Dashboard

Recipients

DCW/Employees

Scheduling

Visit Maintenance

Reports

XREF

Security

Messaging

Date Range

Today

Visit Exceptions

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

Visit Exception Count Per Day



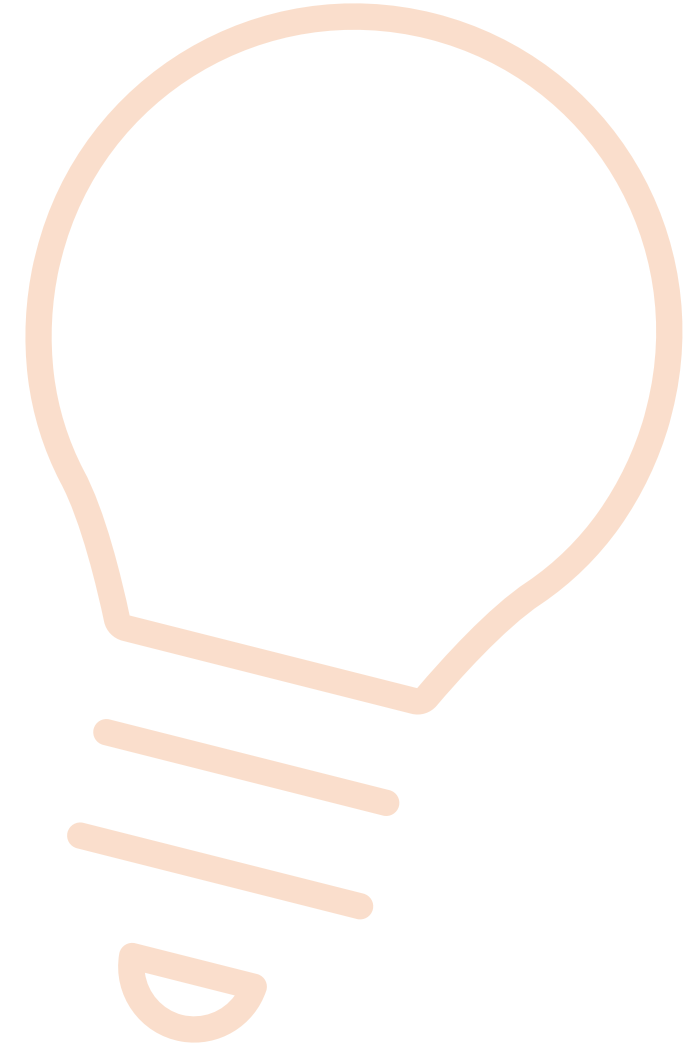
Need some guidance? Use this ^x
OH User Training Guide!

Knowledge Check-Recipient Profile



Which is NOT required to create a Recipient record ?

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



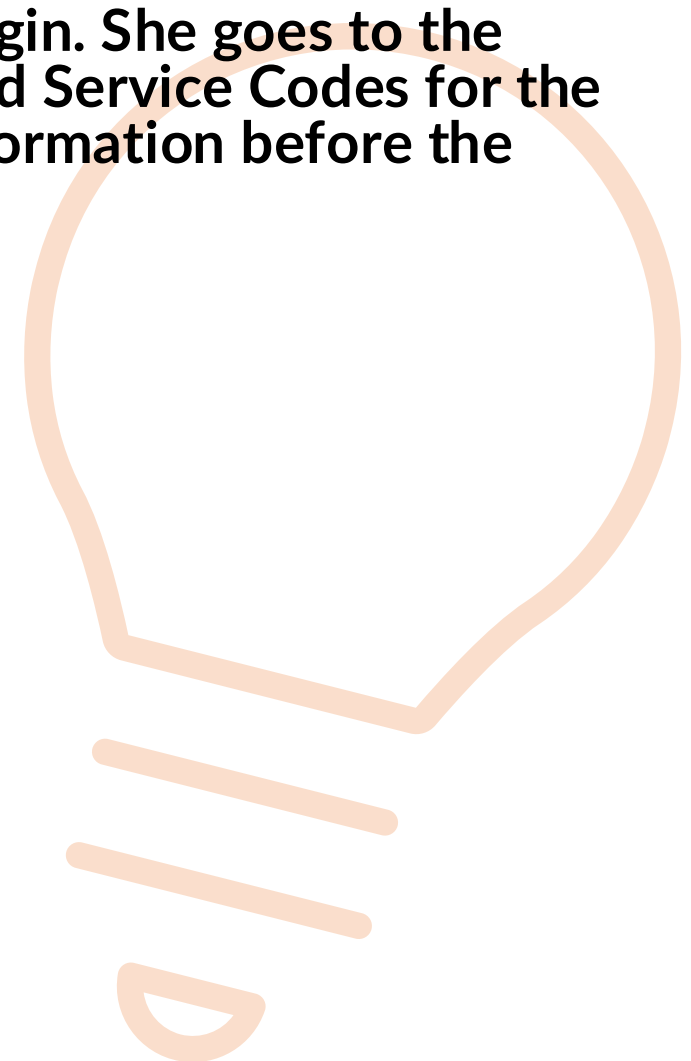


Knowledge Check-Recipient Authorizations



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

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





Creating DCW Profiles (Agency Only)



Independent Providers: Your DCW/Employee records have been created for you!



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



Creating DCW/DCW – Agency Providers Only



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

Visit Counts By Exceptions

Visit Counts By Status

Date Range

Today

Visit Exceptions

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

Visit Exception Count Per Day



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



Exporting Data

Exporting Data from List Views



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

Downloadable options include: CSV, Excel, PDF

Sandata
Home Care

Navigation Modules

Dashboard

Recipients

Recipient Management

DCW/Employees

Scheduling

CREATE RECIPIENT

ACCOUNT: 43600-THAX Training (03/28/2025) - RECORDSV@THAXCHANGE.COM

LOG OUT

Q Type here for a quick search...

FILTERS

EXPORT DATA

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

Demo Video- Exporting Data



Sandata
Home Care

≡

Q Navigate Modules

Dashboard

Recipients

DCW/Employees

Scheduling

Visit Maintenance

Reports

XREF

Security

Messaging

Account: 15800 - HHAeXchange - RECORDING@HHAEXCHANGE.COM - Select Agency

Log Out

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

Exception Count

11/11

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

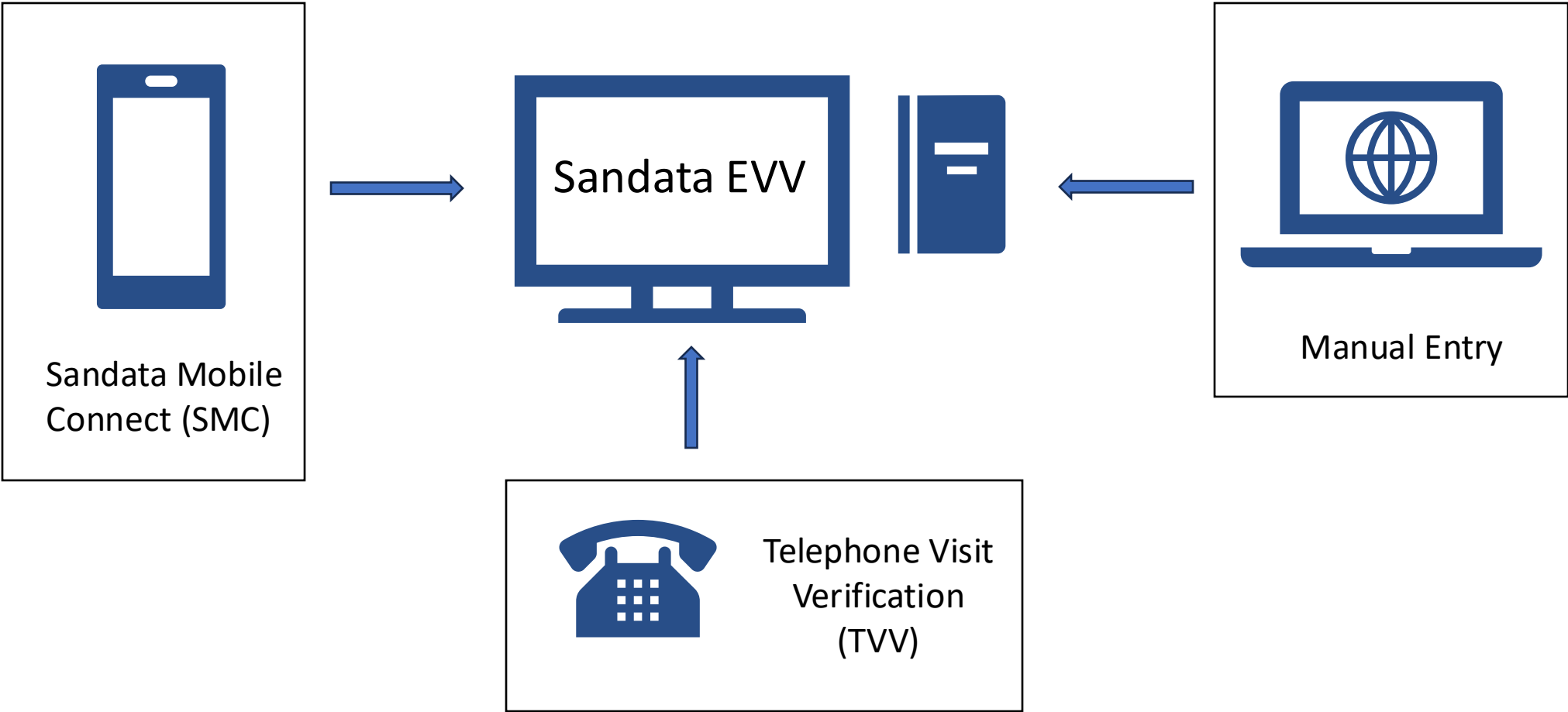
© 2025 Sandata Technologies, LLC

EVV Checkpoints

The content contained herein ("Confidential Information") are the confidential property of HHAeXchange and may not be copied or distributed outside the HHAeXchange organization without the express written consent of HHAeXchange. Distribution of this document or disclosure of any Confidential Information set forth herein to any party other than the intended recipient(s) of this presentation is expressly prohibited.



Visit Capture Methods





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



Enable
Mobile User



Locate the
DCW/Employee
Passcode
(Santrax ID)



Locate
the Sandata
EVV 800 #



Locate the
Recipient ID
or Medicaid
ID



Run Active
DCW/Employees
and
Active Recipients
Report

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



Enable
Mobile User



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



Locate
the TVV #



Locate the
Recipient ID
or Medicaid
ID



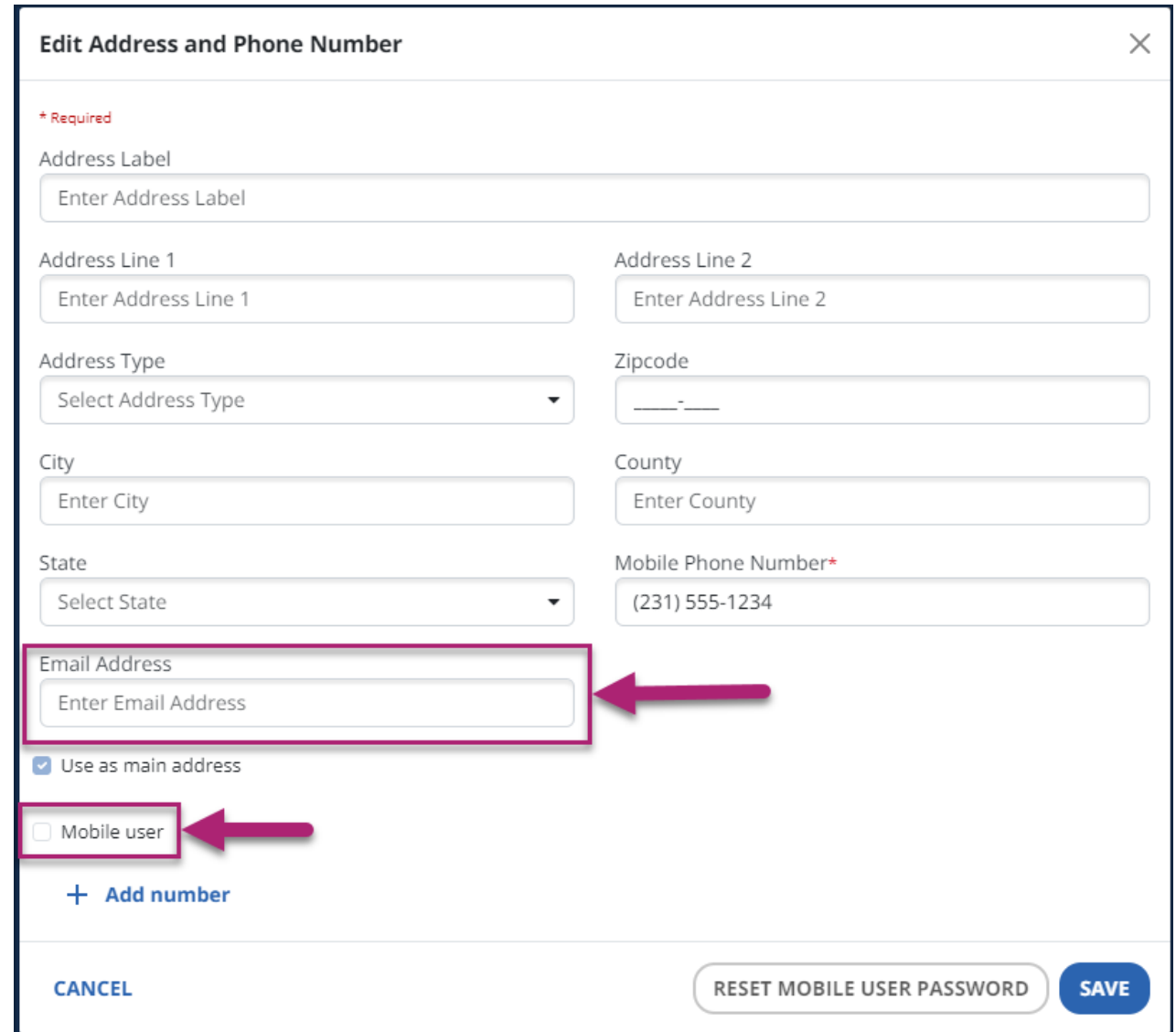
Sandata Mobile Connect (SMC)

Enabling Mobile User



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

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



The screenshot shows a web form titled "Edit Address and Phone Number" with a close button (X) in the top right corner. The form contains several input fields and checkboxes. A red asterisk indicates required fields. The fields are: Address Label, Address Line 1, Address Line 2, Address Type (dropdown), Zipcode, City, County, State (dropdown), and Mobile Phone Number (with a red asterisk). Below these are the Email Address field and a checkbox labeled "Use as main address". At the bottom, there is a checkbox labeled "Mobile user" and a "+ Add number" link. The form is annotated with two red boxes and arrows: one box around the "Email Address" field with an arrow pointing to it from the right, and another box around the "Mobile user" checkbox with an arrow pointing to it from the right. The bottom of the form has three buttons: "CANCEL", "RESET MOBILE USER PASSWORD", and "SAVE".

Edit Address and Phone Number [X]

* Required

Address Label
Enter Address Label

Address Line 1
Enter Address Line 1

Address Line 2
Enter Address Line 2

Address Type
Select Address Type ▼

Zipcode
____-____

City
Enter City

County
Enter County

State
Select State ▼

Mobile Phone Number*
(231) 555-1234

Email Address
Enter Email Address

☒ Use as main address

☐ Mobile user

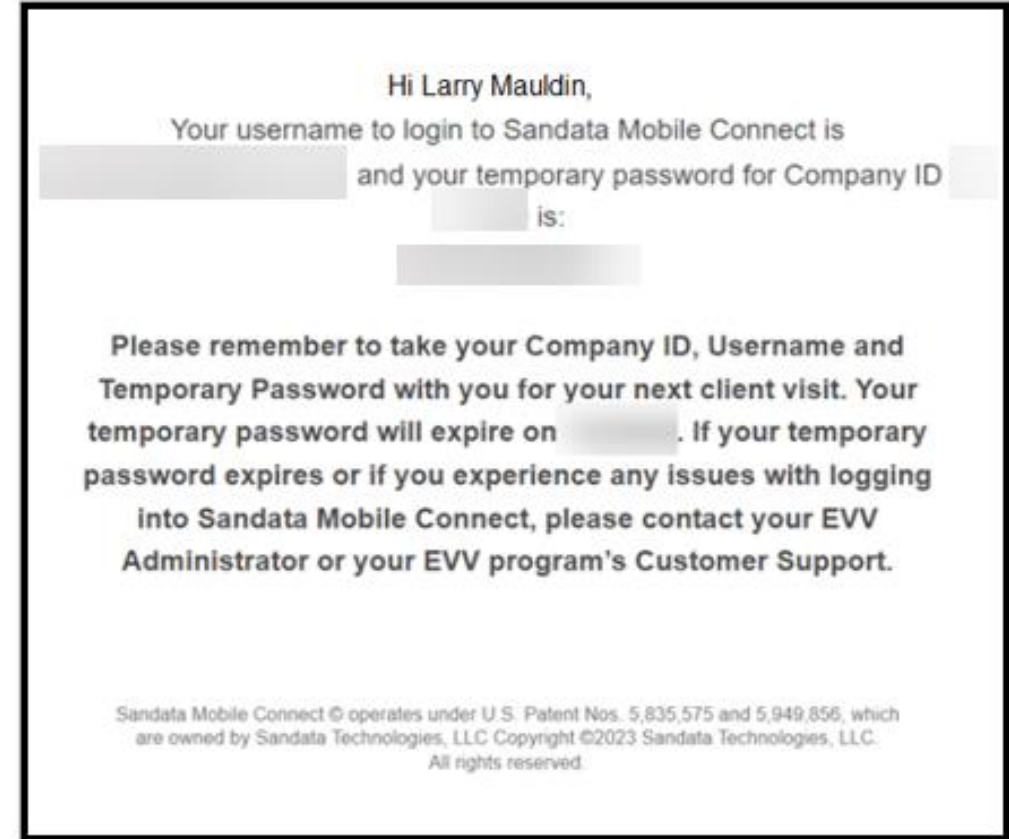
+ Add number

CANCEL RESET MOBILE USER PASSWORD SAVE

Email Confirmation to DCW/Employee



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





First Time Log In



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

Sandata
Mobile Connect®

roger.brown

.....

2-45567

Remember Me

Sign In

Reset Password

Sandata
Mobile Connect®

s.anderson@eastvalleyhospice.com

.....

East Valley Hospice

423178

Marigold Caregivers

561234

East Valley Hospice

423178

Marigold Caregivers

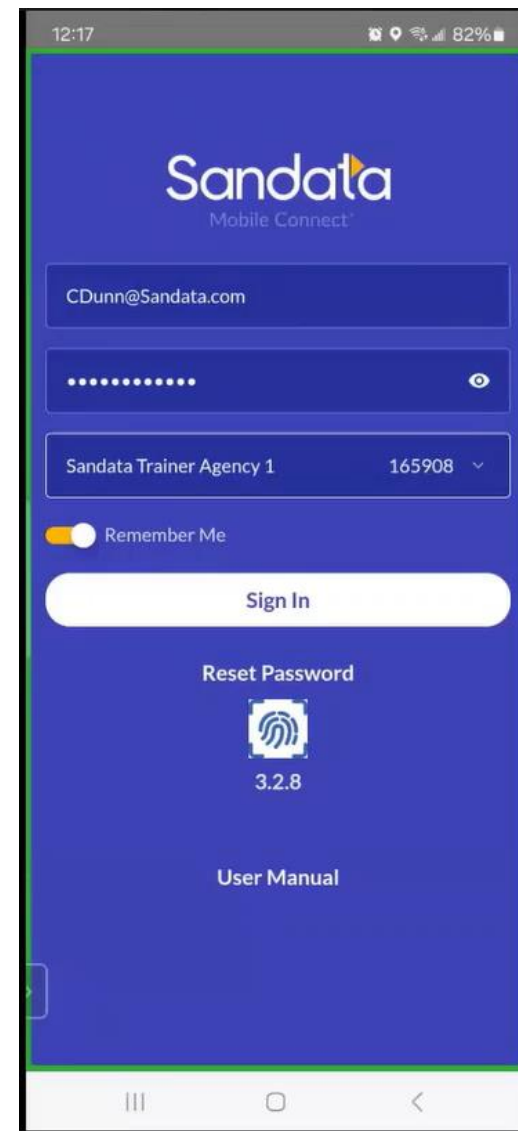
5619817



First Time Log In Demo



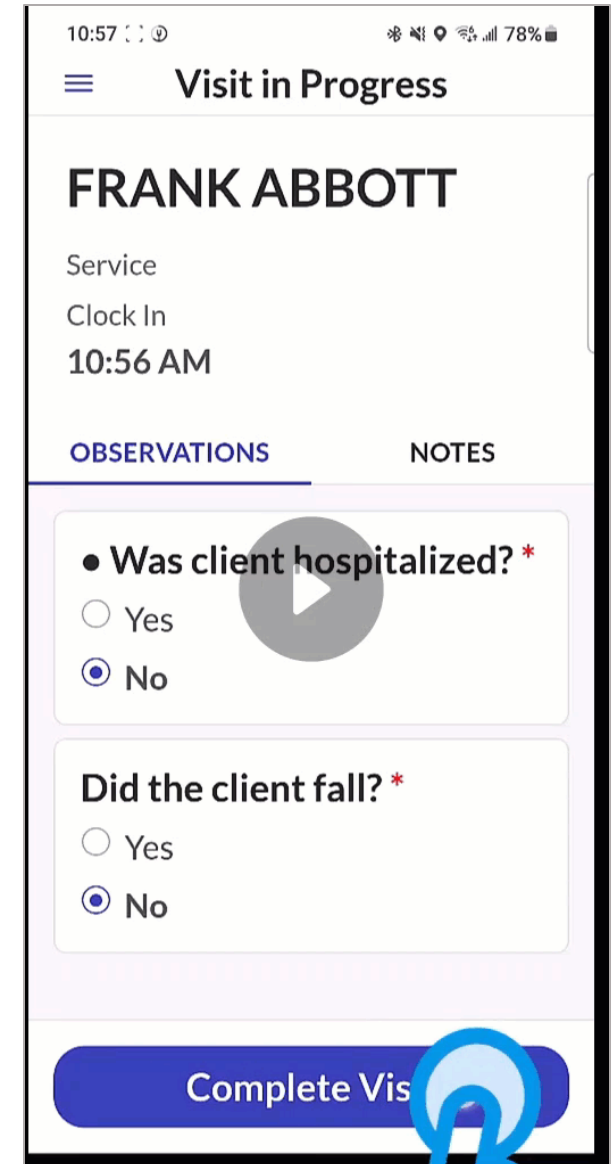
1. From Email, fill in:
 - **Username** (email)
 - **Temporary password**
 - **Company ID**
2. Tap **Sign In**.
3. Create a password using the requirements; tap **Continue**.



Sandata Mobile Connect (SMC)



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



10:57 78%

Visit in Progress

FRANK ABBOTT

Service

Clock In
10:56 AM

OBSERVATIONS NOTES

• Was client hospitalized? *

☐ Yes

☒ No

Did the client fall? *

☐ Yes

☒ No

Complete Visit



Telephony Visit Verification (TVV)

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

> Locating DCW/Employee Passcode



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

Navigate to DCW/Employee Record > Personal Tab

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

DCW/Employees / Edit DCW/Employee

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

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

Personal Schedules


Identifiers

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

Locating Recipient ID/Phone Line





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

Identifiers 

Recipient ID	748558	Medicaid ID	██████████ 299
SSN	-	Agency ID	██████████ 299

Addresses | Phone Numbers [ADD](#)

 400 ANYWHERE

 (501) 444-4444

Main Address

...

Demo Video- EVV Checkpoints



Sandata
Home Care

Microsoft Search (Alt+Q)
Just start typing here to bring features to your fingertips and get help.
Tell me more

DCW/Employees

Scheduling

Visit Maintenance

Reports

XREF

Security

Messaging

Account: 45667 - HHAeXchange - RECORDS@HHAEXCHANGE.COM - Select Agency - 11/11/2024

Visit Counts By Exceptions

Date Range

Today

Visit Exceptions

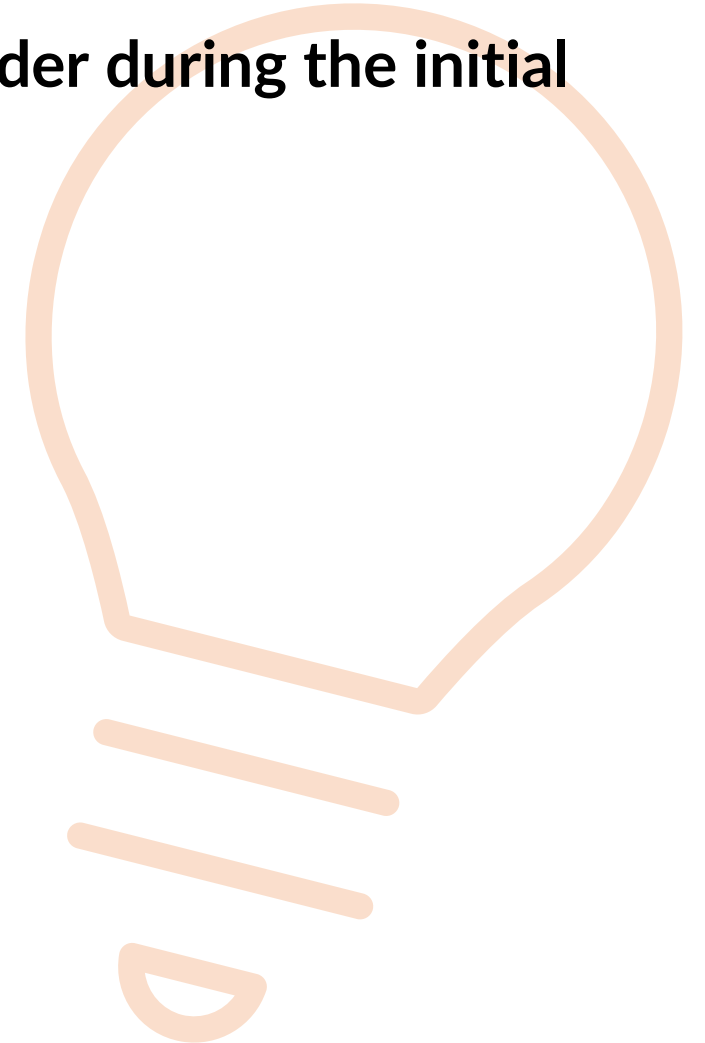
Unknown Recipients	0
Unknown DCW/Employees	0
Visits Without Any Calls	0
Visits Without In-Calls	0
Visits Without Out-Calls	0
Late In-Call	0
No Show Exception	0
Missing Service	0

Visit Exception Count Per Day



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

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





Visit Capture using SMC or TVV

Starting a Visit via SMC App



Option 1: Searching for Recipient ID



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

Option 2: Start Unknown Visit



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

Starting a Visit with Recipient ID

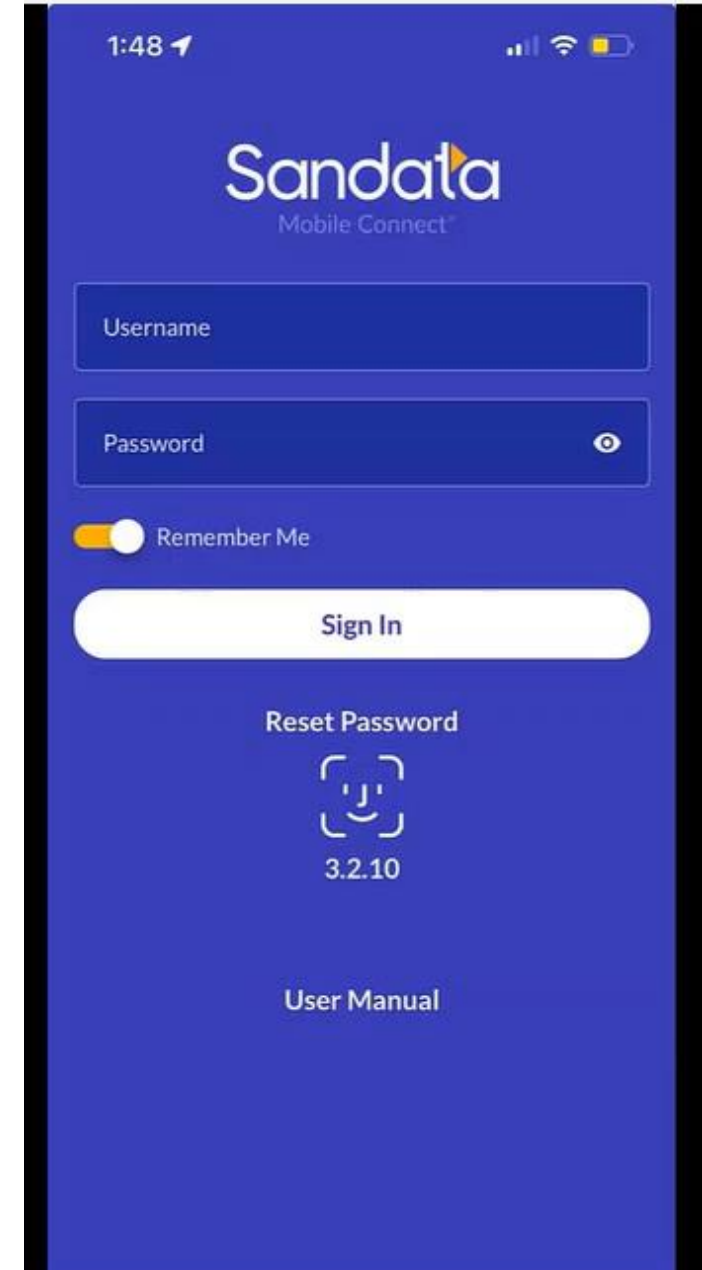


Your DCW arrives at the home of a recipient authorized to receive services. This DCW opted to start her visit by searching for the Recipient ID in the SMC app. This method is preferable as it ensures that all the right details (Recipient ID, Service) are linked to the visit, reducing the chances of visit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

Starting a Visit with Recipient ID Steps

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

[OH-SMC Video Resource](#)





Start an Unknown Visit



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

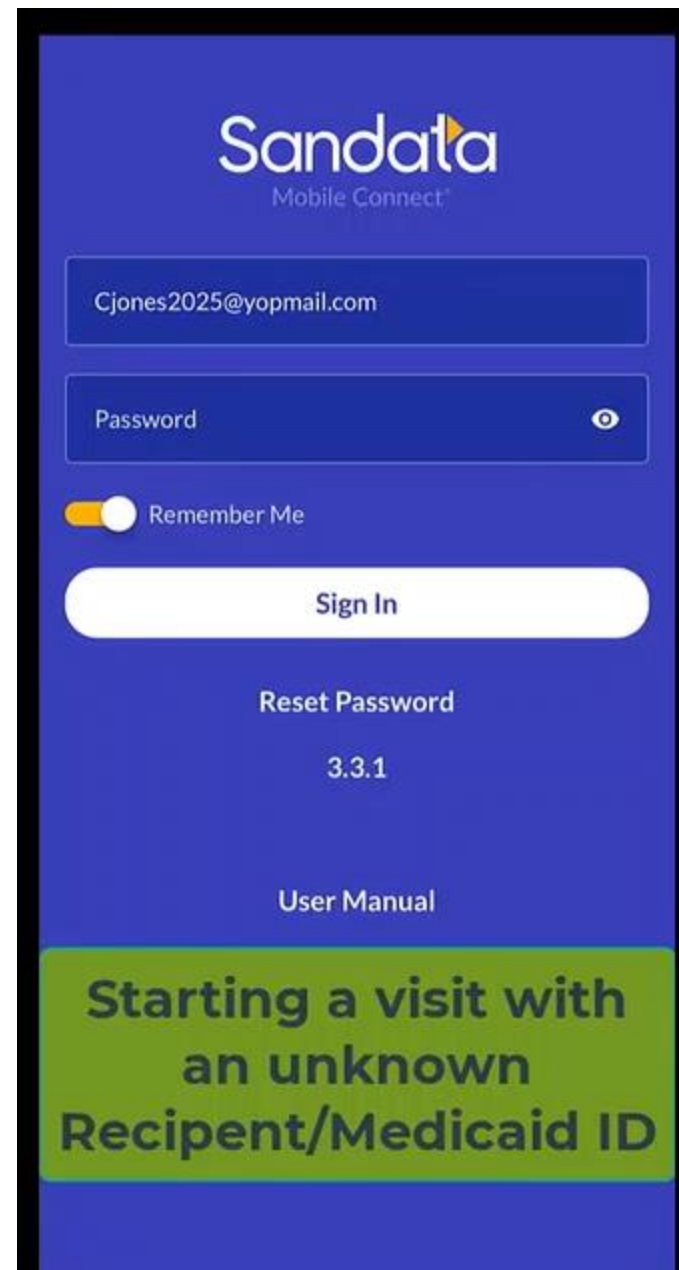
A visit exception will be created and will need to be resolved later by the agency administrator.



Start an Unknown Visit

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

[OH-SMC Video Resource](#)

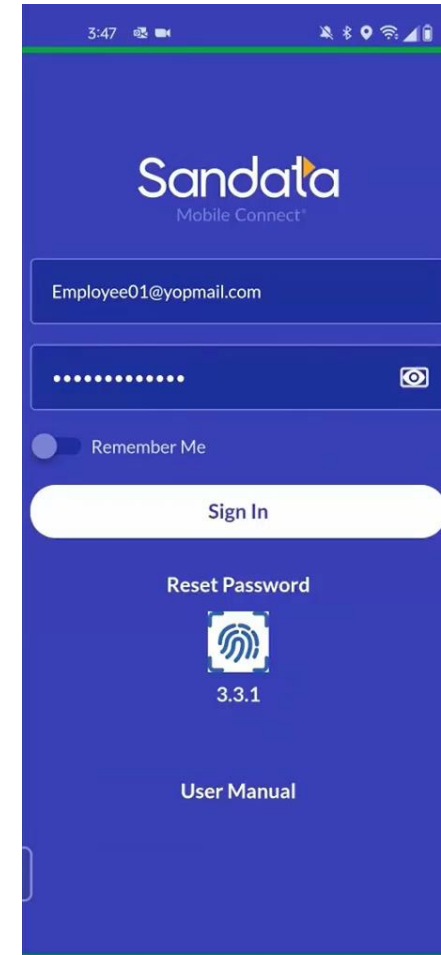




Ending a Visit



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





Why Would You Need to Abandon a Visit?



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

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

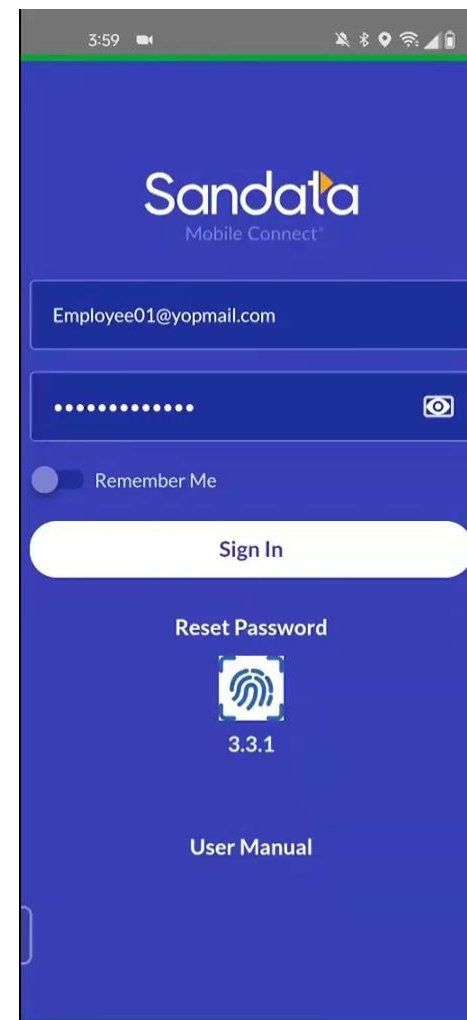
Note: If a DCW forgets to clock out and 24 hours has elapsed the system will automatically abandon the visit.



Abandoning a Visit



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





Overnight Visits



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

Example:

Recipient receives 13 units daily.

Shift: 8:45 pm – 12:30 am

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

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

[Unit Conversion Table](#)



Telephonic Visit Verification (TVV) Information



Service List



Sandata

Ohio Service List

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

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

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

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

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

Write down the Recipient ID in the folder.

Highlight applicable service codes for the recipient.

Scan the QR code for this OH service list .





Prepare for the Call



Ensure this information is available before calling:

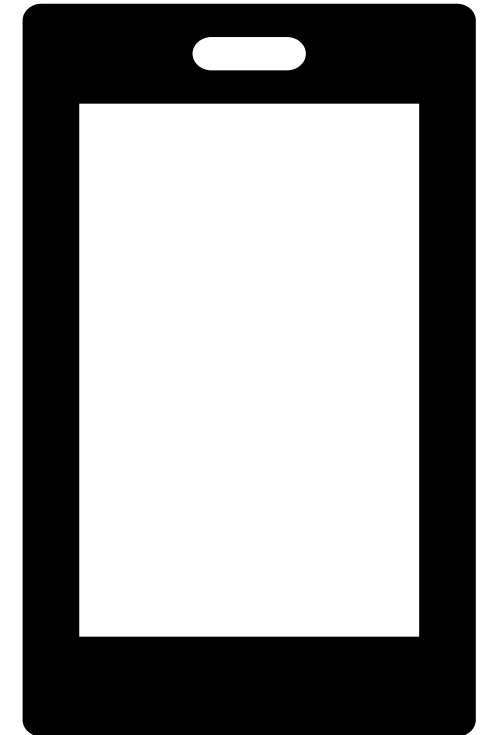
- Santrax ID
- TVV Pin or also known as Passcode for (Independent Providers)
- Recipient ID
- Toll-free number for your agency



Calling In to Start a Visit



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

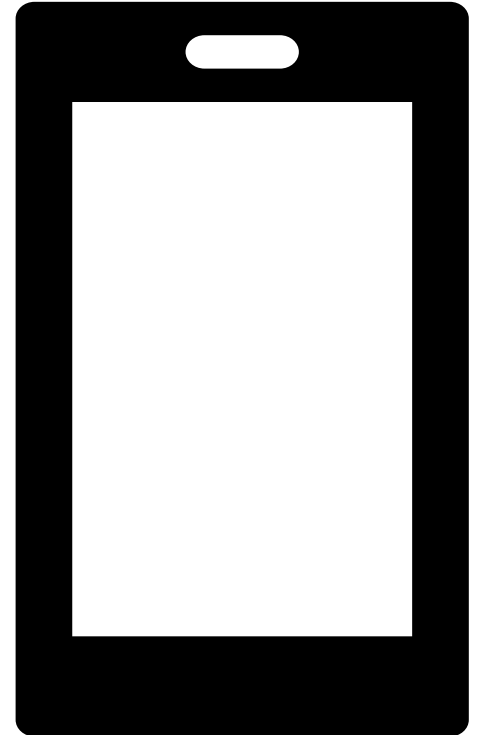




Calling In to End a Visit



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





Preparing your DCW/Employees

➤ Preparing DCW

You should determine...

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

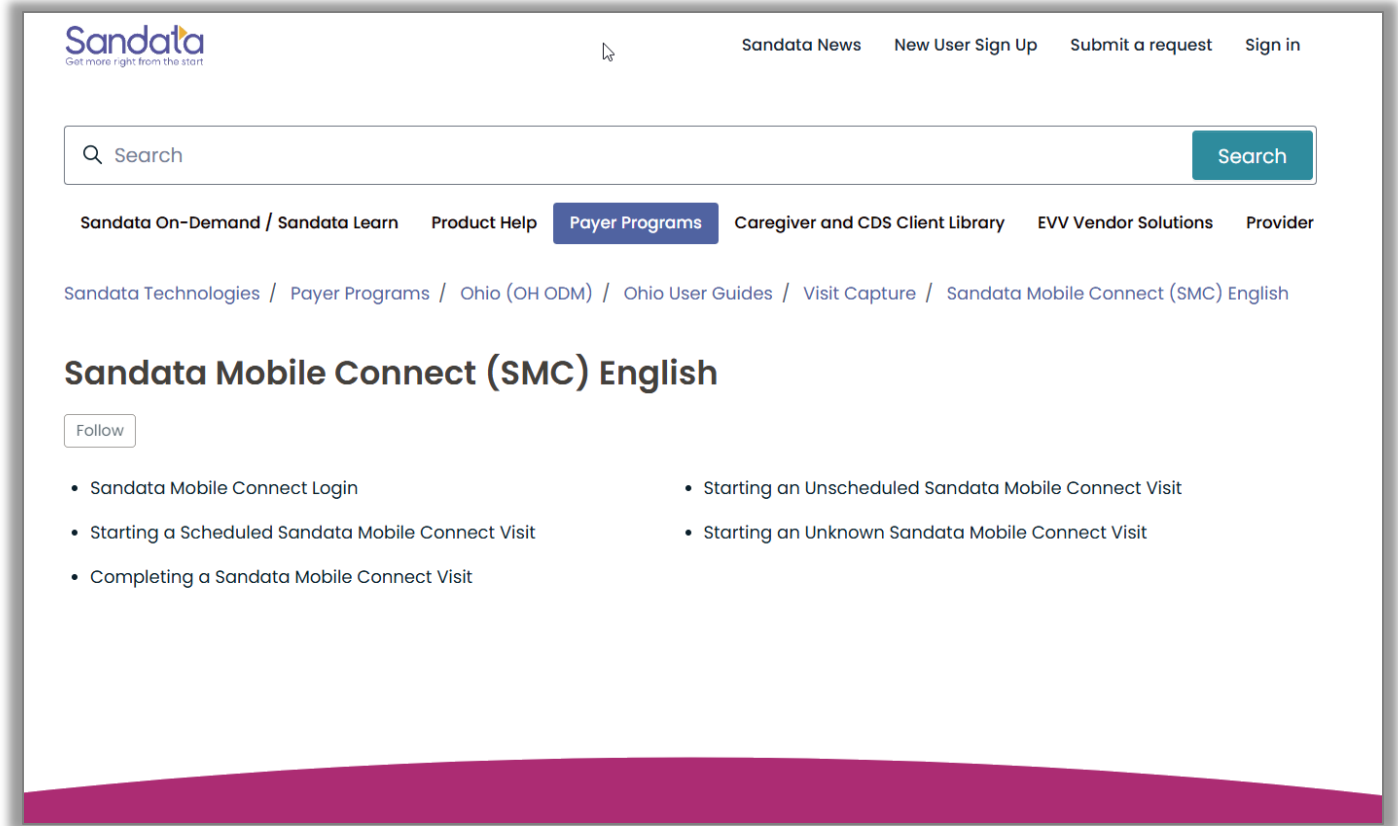
Training DCW/Employees

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

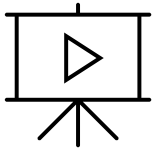




- [Sandata Mobile Connect Documentation](#)
- Documentation on:
 - Downloading and Logging in to mobile app.
 - Starting a visit using the mobile app.
 - [Ohio Service List](#)

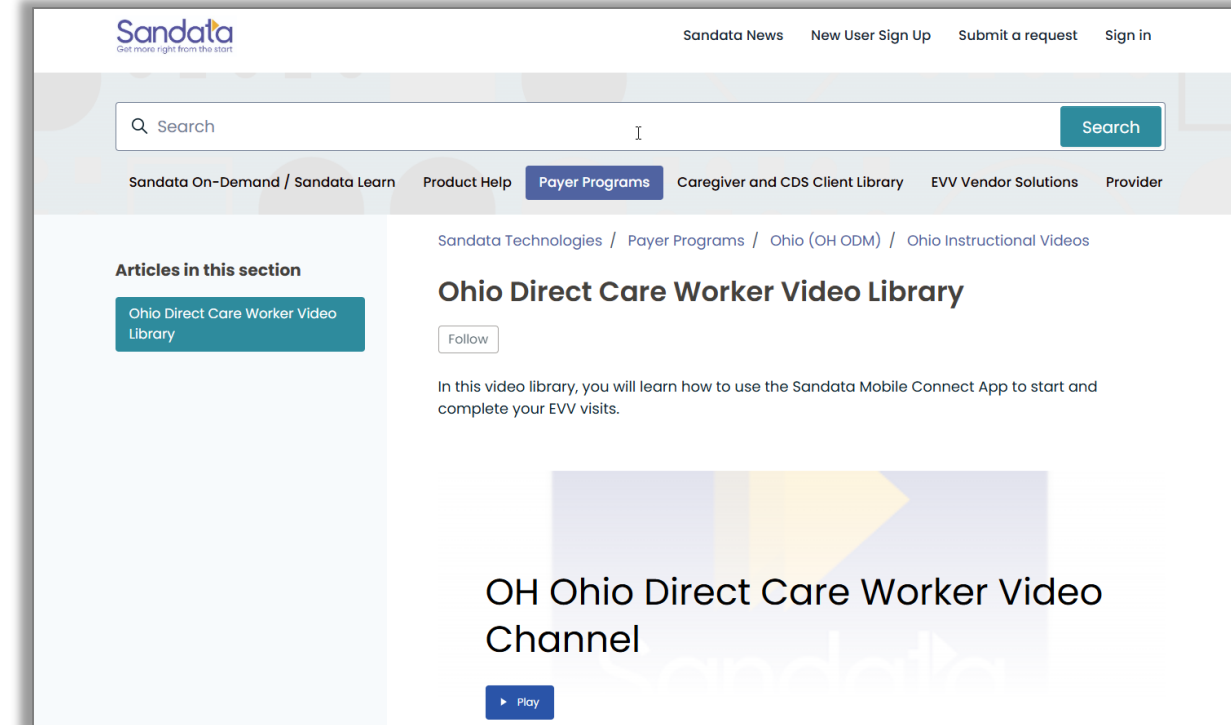


> DCW/Independent Provider Video Library



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

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





Key Takeaways

Key Takeaways – Data Entry



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



Resources



Ohio User Guides:

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

Claims Matching:

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

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: 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

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



Questions?



Register for our Upcoming Trainings

THANKS FOR ATTENDING!



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